

Electronic Resources and Libraries
Conference
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Atlanta GA



eTracker

Improving electronic resources
management by optimizing your
ILS

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Feeling overwhelmed?

The screenshot displays a chaotic digital workspace with several overlapping windows from the Thunderbird email client and a spreadsheet application.

Thunderbird Windows:

- Inbox for deberah.England@wright.edu - Thunderbird:** Shows a list of emails with subjects like "reception --guest from Chile", "Call #00275052 has been logged to", and "With M.anster you can look forward".
- 0_C-E resources for deberah.England@wright.edu - Thunderbird:** Displays a list of resources, including "Carolyn Fang" and "Deberah England".

Spreadsheet Application:

- E-Resources Troubleshooting Tracker:** A large spreadsheet with columns for "Problem", "Problem Resolution Steps", and "Solution". It contains multiple rows of data detailing various access issues and their resolutions.
- Other Spreadsheets:** Several smaller spreadsheets are visible in the background, including "E-Resources Troubleshooting Tracker" and "E-Resources Troubleshooting Tracker".

Other Windows:

- Call Log:** A small table listing calls with columns for "Call", "Date/via", and "Rep".
- Resource List:** A list of resources with columns for "Call", "Date/via", and "Rep".

The overall scene conveys a sense of being overwhelmed by a large volume of digital information and tasks.

Deberah England, ER&L 3/20/08



The Problem...

- **Non-linear workflows**
- **Inadequate staffing for workload**
- **Many people on many teams involved**
- **Tremendous increase in communication**
- **Multiple mechanisms and systems in use**
- **24x7x365**
- **Potential to drop the ball...**



Options...

- **Spreadsheets**
- **Vendor ordering systems**
- **PAMS**
- **Post-its, slips, etc.**
- **More email to others**
- **More email to yourself**

Email - not a viable option

1999 survey of Intel knowledge workers

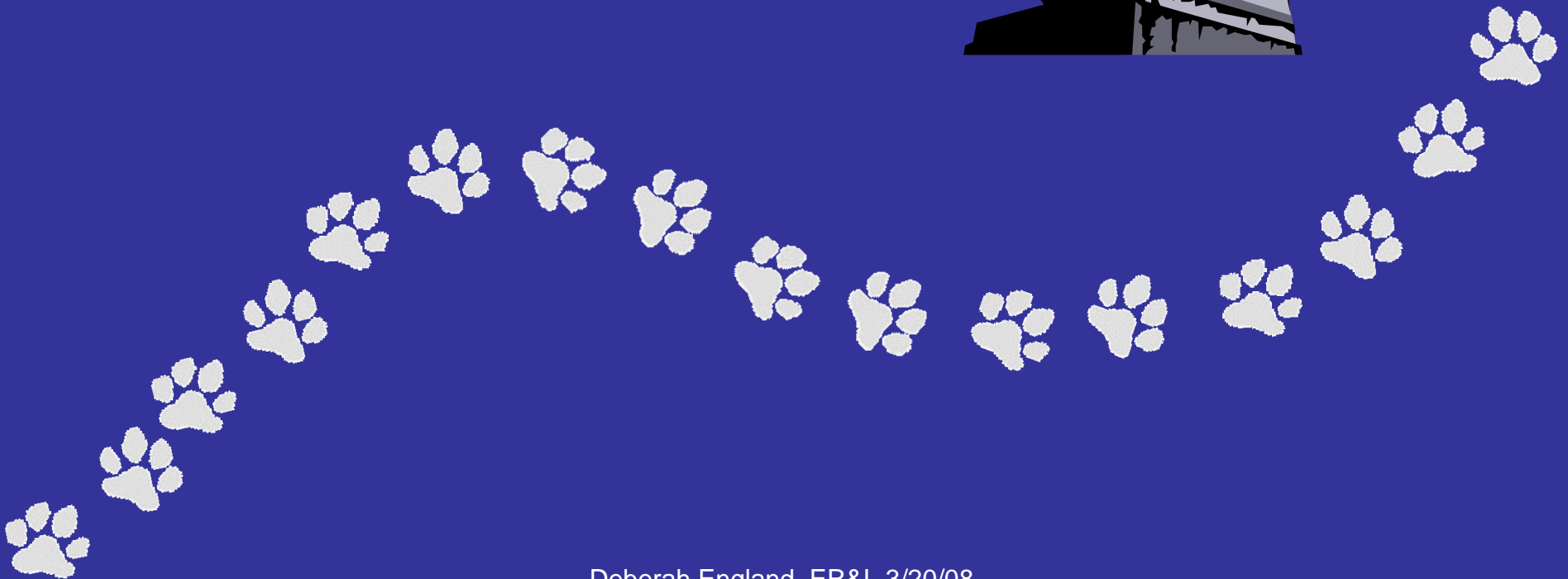
- 200 messages in an inbox
- 30% of email perceived unnecessary
- 2.5 hours per day managing email

2006 survey of all Intel IT employees

- 350 messages received per week
- 20 hours per week managing email
- 40% email has a negative impact on their stress level
- 31% email has a negative impact on their quality of life



What is missing?





Tracking system!

- **Used by IT for troubleshooting**
- **Pooled “seat” access**
- **Only a select few have access**
- **Costly**
- **Easily infiltrated by Spammers**
- **Additional system to monitor...**



What about ERM?

- **No built in tracking mechanism**
- **No mechanism other than more email to track problems**
- **Equals more email in your inbox**
- **None of the ERMS on the market address tracking problems well**

How did we manage?



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Eureka!



File Edit View Go Tools Admin Help

Claiming

Save View Edit Media(0) Summary Print

Range

Current c1007178

c1000007

To c1364522

Previous

Next

Stop

b13965128

TITLE Canadian journal of community mental health = Revue canadienne de sante mentale communautaire

LOCATIONS 052ma

CHECK NOTE Shelved upstairs

CHECK NOTE PUB: 2 iss/yr (per v.21:1)

VEN. TITLE# 90477995

Summary

Record c1007178

Card c1007178

Holdings c1007178

Routing c1007178(0)

0 Bib-Level Holds

Claim One

Claim All

Last payment

PAID: 11-28-2006 INVD: 11-19-2006 INV#: 0012695 AMT: \$64.88 NOTE: 001 copies 2007 V 26 135 VOUCHER...

<div>Spr 2005</div> <div>ARRIVED</div> <div>01-23-2006</div> <div>v.24 no.1</div> <div>1</div>	<div>Fal 2005</div> <div>ARRIVED</div> <div>05-09-2006</div> <div>v.24 no.2</div> <div>1</div>	<div>Spr 2006</div> <div>LATE</div> <div>06-15-2007</div> <div>v.25 no.1</div>	<div>Fal 2006</div> <div>EXPECTED</div> <div>12-15-2007</div> <div>v.25 no.2</div>	<div>Spr 2007</div> <div>EXPECTED</div> <div>06-15-2008</div> <div>v.26 no.1</div>	<div>Fal 2007</div> <div>EXPECTED</div> <div>12-15-2008</div> <div>v.26 no.2</div>
<div>Spr 2008</div> <div>EXPECTED</div> <div>06-15-2009</div> <div>v.27 no.1</div>	<div>Fal 2008</div> <div>EXPECTED</div> <div>12-15-2009</div> <div>v.27 no.2</div>	<div>Spr 2009</div> <div>EXPECTED</div> <div>06-15-2010</div> <div>v.28 no.1</div>			

9 boxes

Global Claim Program

File Edit View Go Tools Admin Help

Claiming Save View Edit Media(0) Summary Print

Range Current c1024383 c1000007 To c1364522 Previous Next Stop

b1235207x

TITLE Ceramic engineering and science proceedings

LOCATIONS 062ga

CHECK NOTE PUB: 5 iss/yr (per v.24:2)

VEN. TITLE# 81817339

Summary Record c1024383 Card c1024383 Holdings c1024383 Routing c1024383

Claim One Claim All

Last payment PAID: 12-05-2005 INVD: 11-22-2005 INV#: 6202005 AMT: \$309.22 NC

ARRIVED 12-14-2006 v.27 no.7 1	ARRIVED 12-14-2006 v.27 no.8 1	ARRIVED 03-28-2007 v.27 no.9 1	LATE 03-01-2007 Contacted Kathy to s v.28 no.1 1
EXPECTED 11-01-2007 v.28 no.5	EXPECTED 03-01-2008 v.29 no.1	EXPECTED 05-01-2008 v.29 no.2	EXPECTED 07-01-2008 v.29 no.3

Modify Boxes Individually

Status **E EXPECTED**

Cover Expected Dates

Month/Season Day Year

Cover date 2007

Expected date 03-01-2007

Enumeration

Levels v. no.

28 1

Claims written 0

Total copies received 0

URL

Public Note
Contacted Kathy to see if cancelled

Staff Note

Suppress From Public Display ☐



MilSer Global Claim program

- **“Range/review edit program”**
- **Systematically cycled through outstanding late & claimed print issues**
- **Easily adaptable to a “claiming” workflow**
- **Proactive, not reactive**
- **How can I adapt this for e?**

Holdings "check-in" box options

File Edit View Go Tools Admin Help						
Edit Functions						
b22086080						
AUTHOR Wonderful World of Ill TITLE Wengen purrs : the charm magazine for purrfectly precious kitties - Test Record						
Summary Record c1359927 Card c1359927 Holdings c1359927 Routing c1359927(0) 0 Bib-Level Holds						
Check-in date Wed Sep 12 2007 <input type="checkbox"/> Create item <input type="button" value="Check In"/>						
UNAVAILABLE 02-26-2007 * Jeff reported asking for S 1	MISSING 02-26-2007 * Called Mass Med Soc: S 1	UNAVAILABLE 02-26-2007 Waiting to hear from Ga S	OUT OF PRINT 02-27-2007 Pub emls rnl to Elec R S	ARRIVED 02-28-2007 * ACCESS RESOLVED S	LATE 06-01-2007 ACCESS TEST	<div></div> BOX OPTIONS FOLLOW
LATE 01-08-2001	ARRIVED 03-01-2007 TEST - TEST	LATE 03-01-2007 TEST - TEST	MISSING 03-01-2007 TEST - TEST	BOUND 03-01-2007 TEST - TEST	TO BIND 03-01-2007 TEST - TEST	BND PREP 03-01-2007 TEST - TEST
REMOVED 03-01-2007 TEST - TEST	BLANK (suppress doe)	OUT OF PRINT 03-01-2007 TEST - TEST	UNAVAILABLE 03-01-2007 TEST - TEST	NOT PUBLISHED 03-01-2007 TEST - TEST		
						26 boxes

eTracker “claiming”

- Run the claim program anytime
- Delegate!
- Anyone authorized to run it can run it
- Can run it everyday, if needed
- Anyone with rights to view, can check status of a problem call
- Information retained in record
- Saves tracking a plethora of email!

Individual boxes

E-TRACKER		Template: EPROB			
Status	UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	EXPECTED	ARRIVED
Represent s problem status	Inaccessible	Inaccessible	Inaccessible	Inaccessible	Access Restored
Transactio n Date	Date problem reported	Date action taken	Date action taken	Date expect access to be resolved	Date problem resolved
Action steps	Problem reported	Claim 1	Claim 2	Problem still open	Problem resolved
Public display box	Problem description	Reported "claimed" problem to & method of notifying	Follow-up "claimed" to & method of notifying	Open as a "flag" box until problem is resolved.	Access verified by.... & any details worth noting
Staff display box	Party who reported problem; how date of email, call etc.	Any additional details need tracking	Any additional details need tracking	<Box will "flag" as "LATE" from # of days from claim on card parameter	Parities notified & by whom
Suppressio n	Box Unsuppressed while call "claim is still open	Box Unsuppressed while call "claim is still open	Box Unsuppressed while call "claim is still open	Box Unsuppressed while call "claim is still open	Box SUPPRESSED once problem is resolved

Setting up eTracker...



- **Select desired codes for eTracker holdings/check-in record**
- **Create check-in card template for eTracker**
- **Define card parameters for eProblem solving**
- **Define card box parameters**
- **Set up a permanent create list**

- Blue captures from ERM
- Green captures from MilSer

Deberah England, ER&L 3/20/08

eTracker coding



Fixed fields

LABEL TYPE		CLAIMON	11-15-2007	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e ULE-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

eTracker coding



Variable fields - basic

MARC Leader #####ny 22#####3n 4500

IDENTITY 843 Arts & Sciences I module

MARC DISPL 856 4 0 <http://ezproxy.libraries.wright.edu:2048/login?url=http://www.jstor.org>

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

ERM Link SLKe1000289

Variable fields - with public note

MARC Leader #####ny 22#####3n 4500

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

INT. NOTE If users cannot access, advise them to try again later. Access becomes available after 30 minutes of inactivity by first/pervious user.

INT. NOTE URL: <http://www.journals.uchicago.edu/IJAL/journal/available.html>

NOTE Access limited to one simultaneous user. Please close browser window when exiting journal.

eTracker record template



File Edit View Go Tools Addmin Help

Edit Functions

Insert

Save

View

Edit

Media(0)

Summary

Browse

Vendor

Print

Close

b26667939

TITLE The journal of genetic genealogy [electronic resource]
IMPRINT [United States] : Journal of Genetic Genealogy, c2005-
ADDED NAME SPARC (Organization)

Summary

New CHECKIN

New Card

New Holdings

New Routing

0 Bib-Level Holds

New CHECKIN Last Updated: 09-26-2007 Created: 09-26-2007 Revisions:

LABEL TYPE	■	CLAIMON	- -	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e UL E-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

New CHECKIN Record

Edit Mode (OVR)

Default card parameters



Status	C Current	Items on card	24
Display mode	C Box Display	Order record	o1230979
<input type="checkbox"/> Create item during check-in		<input type="checkbox"/> Suppress OPAC display	
Issues Supplements Indexes			
Cover Expected Dates		Enumeration	
Frequency	m Monthly		
Chronology Captions			
Level	Caption	Display	
Level1	year	<input type="checkbox"/>	
Level2	month	<input type="checkbox"/>	
Level3	day	<input type="checkbox"/>	
Cover date	Issue	month	day year
Expected date	1st	09-10-2007	
Claiming Binding		Alternate Enumeration	
Days before claim	45	Number of levels	0
Unit of binding	12		
Binding delay	1		
Simple			
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Define card parameters

Status	C Current	Items on card	4
Display mode	C Box Display	Order record	No Order Selected
<input type="checkbox"/> Create item during check-in		<input type="checkbox"/> Suppress OPAC display	
Issues Supplements Indexes			
Cover Expected Dates		Enumeration	
Frequency	z Custom	Number of levels 2	
Days between issues	3	Caption Display Mode Starting Number Pieces per level Numbering continuity	
Chronology Captions		1 v. [] n Numeric 0	
Level	Caption	Display	2 no. [] n Numeric 0 0 r Restart
Level1	year	[]	
Level2	month	[]	
Level3	day	[]	
Cover date		Issue month day year	
Expected date		1st 09-26-2007	
Claiming Binding		Alternate Enumeration	
Days before claim	3	Number of levels 0	
Unit of binding	0		
Binding delay	0		
Simple			
OK Cancel			

Boxes added - ready for data

File Edit View Go Tools Admin Help

Serials Check-in Save View Edit Media(0) Summary Browse Vendor Print Close

b22957157

TITLE Journal of counseling and development [electronic resource] JCD

LOCATIONS 06302

Summary Record c1360966 Card c1360966 Holdings c1360966 Routing c1360966(0) 0 Bib-Level Holds

Check-in date Wed Sep 26 2007 ☒ Print labels ☐ Create item

EXPECTED 09-26-2007	EXPECTED 09-29-2007	EXPECTED 10-02-2007	EXPECTED 10-05-2007		
------------------------	------------------------	------------------------	------------------------	--	--

4 boxes

Set up create list

File Edit View Go Tools Admin Help

Create Lists Functions

AppendDedupeCopyEmptyRenameResumeStopSuspendSettings

Review FilesSaved Searches

AllSearch RecordsSort RecordsList RecordsExport RecordsShow RecordsShow Info

File	Name	Current Records	Max Records	Type	Status	Initials	Created [date/time]
49	Haworth LS e chkins (de 13Aug07)	6	5000	c	complete	dengland	08-13-2007 / 11:32'46
50	Contact records (de 12Sep07)	167	5000	t	complete	dengland	09-12-2007 / 14:53'29
51	Resource records (don't delete) (de 7Feb07)	265	5000	e	complete	dengland	05-03-2007 / 13:28'55
52	Resource records (de 12Sep07)	280	5000	e	complete	dengland	09-12-2007 / 14:51'49
53	MGMT/DML/9-13	51	5000	i	complete	dlawrenc	09-13-2007 / 14:38'03
54	Items on search(08-31-2007)	73	5000	i	complete	cduffy	08-31-2007 / 16:12'13
55	pld missing 13jun07; ssw	43	5000	i	complete	scase	08-29-2007 / 14:08'19
56	popreadstats	615	5000	i	complete	kmathu...	06-18-2007 / 10:07'55
57	OHIONET resources (de 18Jul07)	20	5000	e	complete	dengland	07-18-2007 / 11:57'30
58	pld qtrly missing 29aug07; ssw	65	5000	i	complete	scase	08-29-2007 / 15:38'29
59	Gov Docs no overlay cumul 20070905	507	5000	b	complete	mjenkins	09-05-2007 / 10:00'12
60	FHSL WG for SWORD/lal/24aug07	273	5000	i	complete	lengland	09-05-2007 / 16:53'13
61	Empty	0	5000		empty		
62	SLS bibs	1	5000	b	complete	mjenkins	09-25-2007 / 16:39'12
63	PHYSICIANS/DML/9-12	22	5000	p	complete	dlawrenc	09-13-2007 / 09:23'24
64	RESIDENTS/DML/9-12	39	5000	p	complete	dlawrenc	09-13-2007 / 09:20'12
65	EMPLOYEES/DML/9-12	84	5000	p	complete	dlawrenc	09-13-2007 / 09:24'44
66	ALL PATRONS/DML/9-12	217	5000	p	complete	dlawrenc	09-13-2007 / 10:52'05
67	sycamore/dml/9-12	61	5000	i	complete	dlawrenc	09-12-2007 / 08:04'02
68	new items/dml/9-12	29	5000	i	complete	dlawrenc	09-12-2007 / 08:06'18
69	Gov Docs serials no overlay 20070307	283	2500	b	complete	mjenkins	08-10-2007 / 10:01'08
70	MVH Serials LAL 1/16/07	551	2500	c	complete	lengland	01-16-2007 / 11:37'05
71	Tape load unattached bibs (do not erase)	99	2500	b	complete	mjenkins	08-24-2007 / 13:40'40
72	DAI patrons	100	2500	p	complete	erohmil...	07-18-2007 / 12:36'33
73	SCODE4=e (de 25Sep07)	286	2500	c	complete	dengland	09-25-2007 / 16:18'41
74	SCODE4=1 (A-B) (mj 25sep07)	1828	2500	c	complete	mjenkins	09-25-2007 / 16:33'30
75	SCODE4=2 (C-F) (mj 25sep07)	1127	2500	c	complete	mjenkins	09-25-2007 / 16:34'05
76	SCODE4=3 (G-K) (mj 25sep07)	1271	2500	c	complete	mjenkins	09-25-2007 / 16:34'33
77	SCODE4=4 (L-P) (mj 25sep07)	1209	2500	c	complete	mjenkins	09-25-2007 / 16:35'02
78	SCODE4=5 (Q-Z) (mj 25sep07)	1040	2500	c	complete	mjenkins	09-25-2007 / 16:35'33
79	SCODE4=f (FHSL) (mj 25sep07)	2252	2500	c	complete	mjenkins	09-25-2007 / 16:35'58
80	SCODE4=l (LAKE) (mj 25sep07)	254	2500	c	complete	mjenkins	09-25-2007 / 16:36'22

Define list criteria

Store Record Type: CHECKIN c

Range Start c1000007 Stop c1364546

Term	Operator	Type	Field	Condition	Value A	Value B
1		CHECKIN	SCODE4	equal to	e	

CHECKIN SCODE4 equal to "e"

OK



When to create eTracker records

- **As problems arise**
- **As new titles are added**
- **Systematically select titles**
- **Pull from outstanding email files**



Creating eTracker records

- **Attach check-in record**
- **Select template**
- **Set up card parameters**
- **Enter data in fields as defined by card template**

Attaching holdings records

File Edit View Go Tools Admin Help

Serials Check-in Save All View Edit Media(0) Summary Browse Export Print Close

b26667939

TITLE The journal of genetic genealogy [electronic resource]

Summary Record i29583445 0 Item-Level Holds 0 Bib-Level Holds

View all All Delete Move Select

#	Record Number	DESCRIPTION
<input checked="" type="checkbox"/> 1	i29583445	DUE DATE: - - LOCATION:06302 STATUS:- VOLUME:UL E-JOURNAL ITEM BARCODE:

i29583445 1 Attached Records

Change index to check-in

File Edit View Go Tools Admin Help

Serials Check-in Save All View Edit Media(0) Summary Browse Export Print Close

b26667939

TITLE The journal of genetic genealogy [electronic resource]

Summary Record i29583445 0 Item-Level Holds 0 Bib-Level Holds

View all All

☐ i ITEM
☒ o Order
☒ c Checkin
☐ e Related Resources
☐ h Holds/Bookings
☐ all All

Delete Move Select

DESCRIPTION
DUE DATE: - - LOCATION:06302 STATUS:- VOLUME:UL E-JOURNAL ITEM BARCODE:

i29583445 1 Attached Records

Attach a new checkin record

File Edit View Go Tools Admin Help

Edit Functions Save All Print Close View Edit Media(0) Summary Browse Export

b22956281

TITLE Journal of colonialism & colonial history [electronic resource] sponsored by Towson University
IMPRINT Baltimore, Md. : Johns Hopkins University Press, c2000-
ADDED NAME Towson University

Summary 0 Bib-Level Holds

View c Checkin **Attach New Checkin** Delete Move Select Add Related Resource Remove Related Resource

NO RECORDS OF THIS TYPE

0 Attached Checkin Records

Create an eTracker card

The screenshot displays a web application window titled "Serials Check-in". At the top, there is a menu bar with options: File, Edit, View, Go, Tools, Admin, and Help. Below the menu bar, a toolbar contains buttons for Save, View, Edit, Media(0), Summary, Browse, Print, and Close. The main content area shows the following information:

b22957157

TITLE Journal of counseling and development [electronic resource] JCD

LOCATIONS 06302

Below this information is a tabbed interface with the following tabs: Summary, Record c1360966, Card c1360966, Holdings c1360966, Routing c1360966(0), and 0 Bib-Level Holds. The "Card c1360966" tab is currently selected. Within this tab, there is a button labeled "Create Card", which is circled in red. The bottom of the window features a status bar.

Set up card parameters

File Edit View Go Tools Admin Help

Serials Check-in

b22957157

TITLE Journal of counseling and development [electron

LOCATIONS 06302

Summary Record c1360966 Card c1360966 H

Status C Current Items on card 24

Display mode C Box Display Order record No Order Selected

☐ Create item during check-in ☐ Suppress OPAC display

Issues Supplements Indexes

Cover Expected Dates

Frequency m Monthly

Issue month day year

Cover date 1st

Expected date 1st 09-26-2007

Enumeration

Volume 1

Issue 1

Issues per volume 12

Numbering continuity r Restart

Claiming Binding

Days before claim 45

Unit of binding 12

Binding delay 1

Advanced

OK Cancel

Close

Alter card parameters

File Edit View

Edit Function

b26667939

TITLE
IMPRINT
ADDED NAME

Summary

Status: C Current

Display mode: C Box Display

Items on card: 4

Order record: No Order Selected

☐ Create item during check-in

☐ Suppress OPAC display

Issues Supplements Indexes

Cover Expected Dates

Frequency: f Semiannual

Chronology Captions

Level	Caption	Display
Level1	year	<input type="checkbox"/>
Level2	month	<input type="checkbox"/>
Level3	day	<input type="checkbox"/>

Cover date: 1st

Expected date: 1st 09-26-2007

Claiming Binding

Days before claim: 91

Unit of binding: 0

Binding delay: 0

Enumeration

Number of levels: 2

Caption	Display	Mode	Starting Number	Pieces per level	Number continued
1 v.	<input type="checkbox"/>	n Numeric	0		
2 no.	<input type="checkbox"/>	n Numeric	0	0	r Resta

Alternate Enumeration

Number of levels: 0

Simple

OK Cancel

eTracker boxes created

File Edit View Go Tools Admin Help

Serials Check-in Save View Edit Media(0) Summary Browse Vendor Print Close

b22957157

TITLE Journal of counseling and development [electronic resource] JCD

LOCATIONS 06302

Summary Record c1360966 Card c1360966 Holdings c1360966 Routing c1360966(0) 0 Bib-Level Holds

Check-in date Wed Sep 26 2007 ☒ Print labels ☐ Create item

EXPECTED 09-26-2007	EXPECTED 09-29-2007	EXPECTED 10-02-2007	EXPECTED 10-05-2007		
------------------------	------------------------	------------------------	------------------------	--	--

4 boxes

Box 1 = Problem reported

File Edit View Go Tools Admin Help

Serials Check-in

b22957157

TITLE Journal of counseling and development [electr

LOCATIONS 06302

Summary Record c1360966 Card c1360966

Check-in date Wed S

EXPECTED 09-26-2007	EXPECTED 09-29-2007
------------------------	------------------------

Modify Boxes Individually

Status: E EXPECTED

Cover Expected Dates: T TO BIND, S BND PREP, R REMOVED, N BLANK, O OUT OF PRINT, U UNAVAILABLE, L NOT PUBLISHED

Cover date: 09-26

Expected date: 09-26

Enumeration Levels: (v.), (no.)

Claims written: 0

Total copies received: 0

URL:

Public Note: PROBLEM

Staff Note: Who reported; may want to reference email

Suppress From Public Display: ☐

OK Cancel

Box 2 = "Claim" action

Serials Check-in

b22957157

TITLE Journal of counseling and development [electronic]

LOCATIONS 06302

Summary Record c1360966 Card c1360966

Check-in date Wed 9/26/2007

UNAVAILABLE
09-26-2007
PROBLEM

* EXPECTED
09-29-2007

Modify Boxes Individually

Status: E EXPECTED

Cover Expected Dates: T TO BIND, S BND PREP, MR REMOVED, S IN BLANK, U UNAVAILABLE (selected), L NOT PUBLISHED

Cover date: []

Expected date: 09-29-2007

Enumeration Levels (v.) [], (no.) []

Claims written: 0

Total copies received: 0

URL: []

Public Note: ACTION TAKEN

Staff Note: Note who you contacted & any additional details you want to track

Suppress From Public Display: ☐

OK Cancel

Box 3 = Any additional action

File Edit View Go Tools Admin Help

Serials Check-in

b22957157

TITLE Journal of counseling and development [electronic resource] JCD

LOCATIONS 06302

Summary Record c1360966 Card c1360966 Holdings c1360966

Check-in date Wed Sep 26 2007 ☒ P

UNAVAILABLE 09-26-2007 PROBLEM	UNAVAILABLE 09-29-2007 ACTION TAKEN	EXPECTED 10-02-2007
--------------------------------------	-------------------------------------------	------------------------

4 boxes

Modify Boxes Individually

Status: E EXPECTED

Cover Expected Dates: T TO BIND, S BND PREP, MR REMOVED, S IN BLANK, O OUT OF PRINT, U UNAVAILABLE, L NOT PUBLISHED

Cover date:

Expected date: 10-02-2007

Enumeration Levels (v.) (no.)

Claims written:

Total copies received:

URL:

Public Note: ACTION TAKEN

Staff Note: Note any additional steps or communication if needed

Suppress From Public Display ☐

OK Cancel

Box 4 = Problem resolved

File Edit View Go Tools Admin Help

Serials Check-in

b22957157

TITLE Journal of counseling and development [electr

LOCATIONS 06302

Summary Record c1360966 Card c1360966

Check-in date Wed S

UNAVAILABLE 09-26-2007 PROBLEM	UNAVAILABLE 09-29-2007 ACTION TAKEN
--------------------------------------	-------------------------------------------

Modify Boxes Individually

StatusA ARRIVED

Cover Expected Dates

Month/SeasonDayYear

Cover date

Expected date10-05-2007

Enumeration

Levels(v.)(no.)

Claims written0

Total copies received0

URL

Public NoteRESTORED

Staff NoteNote information you want to retain; note contacts updated

Suppress From Public Display☒

OKCancel

VendorPrintClose

4 boxes

Flag box – important for open calls

The screenshot displays a library catalog interface with a modal dialog box open on the left and a main record view on the right.

Modal Dialog Box (Left):

- Status:** E EXPECTED
- Cover Expected Dates:**
 - Cover date: Month/Season, Day, Year
 - Expected date: 10-05-2007
- Enumeration:**
 - Levels: (v.) and (no.)
- Claims written:** 0
- Total copies received:** 0
- URL:**
- Public Note:**
- Staff Note:** Flag box - flags program; kept "expected" until problem is resolved
- Suppress From Public Display:** ☐
- Buttons:** OK, Cancel

Main Record View (Right):

- View:** Edit, Media(0), Summary, Browse, Vendor, Print, Close
- Record ID:** 966
- Routing:** c1360966(0)
- Bib-Level Holds:** 0
- Buttons:** Print labels, Create item, Check In
- Flag Box:** A green box containing the text "EXPECTED 10-05-2007" is highlighted with a red oval.
- Footer:** 4 boxes

Suppression = visual aid

File Edit View Go Tools Admin Help

Serials Check-in Save View Edit Media(0) Summary Browse Vendor Print Close

b22957157

TITLE Journal of counseling and development [electronic resource] JCD

LOCATIONS 06302

Summary Record c1360966 Card c1360966 Holdings c1360966 Routing c1360966(0) 0 Bib-Level Holds

Check-in date Wed Sep 26 2007 ☒ Print labels ☐ Create item

UNAVAILABLE 09-26-2007 PROBLEM S	UNAVAILABLE 09-29-2007 ACTION TAKEN S	UNAVAILABLE 10-02-2007 ACTION TAKEN S	ARRIVED 10-05-2007 RESTORED ACCESS S		
-------------------------------------------	------------------------------------------------	------------------------------------------------	-----------------------------------------------	--	--

4 boxes

eTracker card box examples



- **Missing link**
- **Lapsed sub**

Problem reported

File Edit View Go Tools Admin Help

Edit Functions

Review Current 14 of 286

b21077010

TITLE OhioLINK Digital Media Center databases [electronic resource]

Summary Record c1360619 Card c1360619 Holdings c1360619

Check-in date Tue Sep 25 2007 ☒ Print label

UNAVAILABLE 05-03-2007 LINK MISSING S	UNAVAILABLE 05-03-2007 OL NOTIFIED S	ARRIVED 05-07-2007 RESOLVED S	EXPECTED 10-01-2007 ACCESS TEST
------------------------------------------------	-----------------------------------------------	----------------------------------------	---------------------------------------

Modify Boxes Individually

Status: U UNAVAILABLE

Cover Expected Dates

Month/Season Day Year

Cover date:

Expected date: 05-03-2007

Enumeration Levels:

Claims written: 0

Total copies received: 0

URL:

Public Note: LINK MISSING

Staff Note: KKimber rptd link missing for "Running with the Bulls" video (de 3May07)

Suppress From Public Display ☒

OK Cancel

Action taken

File Edit View Go Tools Admin Help

Edit Functions

Review Current 14 of 286

b21077010

TITLE OhioLINK Digital Media Center databases [electronic resource]

Summary Record c1360619 Card c1360619 Holdings c1360619 Rout

Check-in date Tue Sep 25 2007 ☒ Print la

UNAVAILABLE 05-03-2007 LINK MISSING S	UNAVAILABLE 05-03-2007 OL NOTIFIED S	ARRIVED 05-07-2007 RESOLVED S	EXPECTED 10-01-2007 ACCESS TE
------------------------------------------------	-----------------------------------------------	----------------------------------------	-------------------------------------

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Cover date Month/Season Day Year

Expected date 05-03-2007

Enumeration Levels

Claims written 0

Total copies received 0

URL

Public Note OL NOTIFIED

Staff Note Rpt missing link problem to OhioLINK via form (de 3May07)

Suppress From Public Display ☒

OK Cancel

Problem resolved



File Edit View Go Tools Admin Help

Serials Check-in

b21077010

TITLE OhioLINK Digital Media Center databases [electronic resource]

LOCATIONS 06302

Summary Record c1360619 Card c1360619 Holdings c1360619

Check-in date Thurs Sep 27 2007 ☒ Prior

UNAVAILABLE 05-03-2007 LINK MISSING S	UNAVAILABLE 05-03-2007 OL NOTIFIED S	ARRIVED 05-07-2007 RESOLVED S
EXPECTED 10-01-2007 ACCESS TEST	EXPECTED 04-04-2008 ACCESS TEST	EXPECTED 10-07-2008 ACCESS TEST

10 boxes

Modify Boxes Individually

Status A ARRIVED

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 05-07-2007

Enumeration

Levels

Claims written 0

Total copies received 0

URL

Public Note RESOLVED

Staff Note per eml from OL on 7May07 (de 7May07)

Suppress From Public Display ☒

OK Cancel

Problem reported

File Edit View Go Tools Admin Help

Serials Check-in

Review Current 50 of 286

b25921575

TITLE Journal of women and minorities in science and engineering [electronic resource]

LOCATIONS 06302

Summary Record c1361235 Card c1361235 Holdings c1361235 Routing c

Check-in date Tue Sep 25 2007 ☒ Print labels

UNAVAILABLE 06-26-2007 ACCESS DENIED S	UNAVAILABLE 06-26-2007 NOTIFIED BEGELL S	UNAVAILABLE 06-27-2007 SUB LAPSED S	UNAVAILABLE 06-28-2007 USER NOTICE OF S
EXPECTED 11-07-2008 ACCESS TEST	EXPECTED 05-07-2009 ACCESS TEST		

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 06-26-2007

Enumeration

Levels (v.)

(no.)

Claims written 0

Total copies received 0

URL

Public Note ACCESS DENIED

Staff Note Access denied error msg rcvd when trying to access; Rptd by Jeff

Suppress From Public Display ☒

9 boxes

Action taken

File Edit View Go Tools Admin Help

Serials Check-in

Review Current 50 of 286

b25921575

TITLE Journal of women and minorities in science and engineering [electronic resource]

LOCATIONS 06302

Summary Record c1361235 Card c1361235 Holdings c1361235 Routing c1361235

Check-in date Tue Sep 25 2007 ☒ Print labels

UNAVAILABLE 06-26-2007 ACCESS DENIED S	UNAVAILABLE 06-26-2007 NOTIFIED BEGELL S	UNAVAILABLE 06-27-2007 SUB LAPSED S	UNAVAILABLE 06-28-2007 USER NOTICE OF L S
EXPECTED 11-07-2008 ACCESS TEST	EXPECTED 05-07-2009 ACCESS TEST		

9 boxes

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date

Enumeration

Levels (v.)

(no.)

Claims written

Total copies received

URL

Public Note

Staff Note

Suppress From Public Display ☒

Root of problem

File Edit View Go Tools Admin Help

Serials Check-in

Review Current 50 of 286

b25921575

TITLE Journal of women and minorities in science and engineering [electronic resource]

LOCATIONS 06302

Summary Record c1361235 Card c1361235 Holdings c1361235 Routing c1361235

Check-in date Tue Sep 25 2007 ☒ Print labels

UNAVAILABLE 06-26-2007 ACCESS DENIED S	UNAVAILABLE 06-26-2007 NOTIFIED BEGELL S	UNAVAILABLE 06-27-2007 SUB LAPSED S	UNAVAILABLE 06-28-2007 USER NOTICE OF L S
EXPECTED 11-07-2008 ACCESS TEST	EXPECTED 05-07-2009 ACCESS TEST		

9 boxes

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 06-27-2007

Enumeration

Levels (v.)

(no.)

Claims written 0

Total copies received 0

URL

Public Note SUB LAPSED

Staff Note Sub lapsed per Begell House on June 10. Per Kathy H no i invoice rcvd.

Suppress From Public Display ☒

OK Cancel

Notified users

File Edit View Go Tools Admin Help

Serials Check-in

Review Current 50 of 286

b25921575

TITLE Journal of women and minorities in science and engineering [electronic resource]

LOCATIONS 06302

Summary Record c1361235 Card c1361235 Holdings c1361235 Routing c1361235

Check-in date Tue Sep 25 2007 ☒ Print labels

UNAVAILABLE 06-26-2007 ACCESS DENIED S	UNAVAILABLE 06-26-2007 NOTIFIED BEGELL S	UNAVAILABLE 06-27-2007 SUB LAPSED S	UNAVAILABLE 06-28-2007 USER NOTICE OF L S
EXPECTED 11-07-2008 ACCESS TEST	EXPECTED 05-07-2009 ACCESS TEST		

9 boxes

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 06-28-2007

Enumeration

Levels (v.)

(no.)

Claims written 0

Total copies received 0

URL

Public Note USER NOTICE OF LAPSE

Staff Note Added note to SS profile that title is temp suspended until Mid-July 2007; Updated Jeff on situation via eml

Suppress From Public Display ☒

OK Cancel

Problem resolved



File Edit View ...

Serials Ch

Review

b25921575

TITLE Journa

LOCATIONS

Summary F

UNAVAILABLE
06-26-2007
ACCESS DENIED
S

EXPECTED
11-07-2007
ACCESS TEST

Modify Boxes Individually

Status: A ARRIVED

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date: 07-07-2007

Enumeration

Levels (v.) (no.)

Claims written: 0

Total copies received: 0

URL

Public Note: RESTORED

Staff Note: Verify if Begell has reactivated sub; if so delete SS profile note & notify Jeff, Access verified; deleted SS note (de 9Jul07)

Suppress From Public Display ☒

OK Cancel

Save View Edit Media(0) Summary Print

Previous Next Stop

source]

ing c1361235(0) 0 Bib-Level Holds

Labels ☐ Create item Check In

FILE	ARRIVED 07-07-2007 RESTORED S	EXPECTED 11-07-2007 ACCESS TEST	EXPECTED 05-07-2008 ACCESS TEST
------	----------------------------------------	---------------------------------------	---------------------------------------

9 boxes

Ticklers...

File Edit View Go Tools Admin Help	
Edit Functions	
<div> <div>Review</div> <div>Current 50 of 286</div> <div>Previous</div> <div>Next</div> <div>Stop</div> </div>	
b25921575	
TITLE Journal of women and minorities in science and engineering [electronic resource] LCCN 99111640	
<div> <div>Summary</div> <div>Record c1361235</div> <div>Card c1361235</div> <div>Holdings c1361235</div> <div>Routing c1361235(0)</div> <div>0 Bib-Level Holds</div> </div>	
c1361235 Last Updated: 09-25-2007 Created: 06-28-2007 Revisions: 4	
LABEL TYPE	CLAIMON 02-06-2008
ORDERED BY	LOCATION 06302 UL e-journal
DISPLAY	s NDLOC/NOCON RLOC e ULE-RESOURCE
COPIES	1
SCODE3 SCODE4 e E-RESOURCES UPDCNT PCOUNT 0	
MARC Leader #####ny 22#####3n 4500	
Tickler	Name: Invoice Rcpt verification Date(YYYYMMDD): 20080501 Send to: kathleen.hennessy@wright.edu, deberah.england@wright.edu Subject: Begell House - invoice rcvd? Header: Good Morning Kathy! Footer: Verify if Begell House invoice for Jnl of Wm & Minorities in Science & Engineering is rcvd
Ticklerlog	Name: Check Access Event Date: 20070707 Request Date: 20070707 Sent to: deberah.england@wright.edu Subject: Check Access : Jnl of women & minorities in science and engineering Header: Good morning Deberah - I have work for you If activated - delete SS note and notify Jeff
INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE	
c1361235 Edit Mode (OVR)	

Deberah England, ER&L 3/20/08

eProblem history retained



File Edit View Go Tools Admin Help

Serials Check-in

Save

View

Edit

Media(0)

Summary

Print

Review

Current 50 of 286

Previous

Next

Stop

b25921575

TITLE Journal of women and minorities in science and engineering [electronic resource]

LOCATIONS 06302

Summary

Record c1361235

Card c1361235

Holdings c1361235

Routing c1361235(0)

0 Bib-Level Holds

Check-in date Tue Sep 25 2007

☒ Print labels

☐ Create item

Check In

UNAVAILABLE
06-26-2007
ACCESS DENIED

S

UNAVAILABLE
06-26-2007
NOTIFIED BEGELL

S

UNAVAILABLE
06-27-2007
SUB LAPSED

S

UNAVAILABLE
06-28-2007
USER NOTICE OF L

S

ARRIVED
07-07-2007
RESTORED

S

EXPECTED
11-07-2007
ACCESS TEST

EXPECTED
05-07-2008
ACCESS TEST

EXPECTED
11-07-2008
ACCESS TEST

EXPECTED
05-07-2009
ACCESS TEST

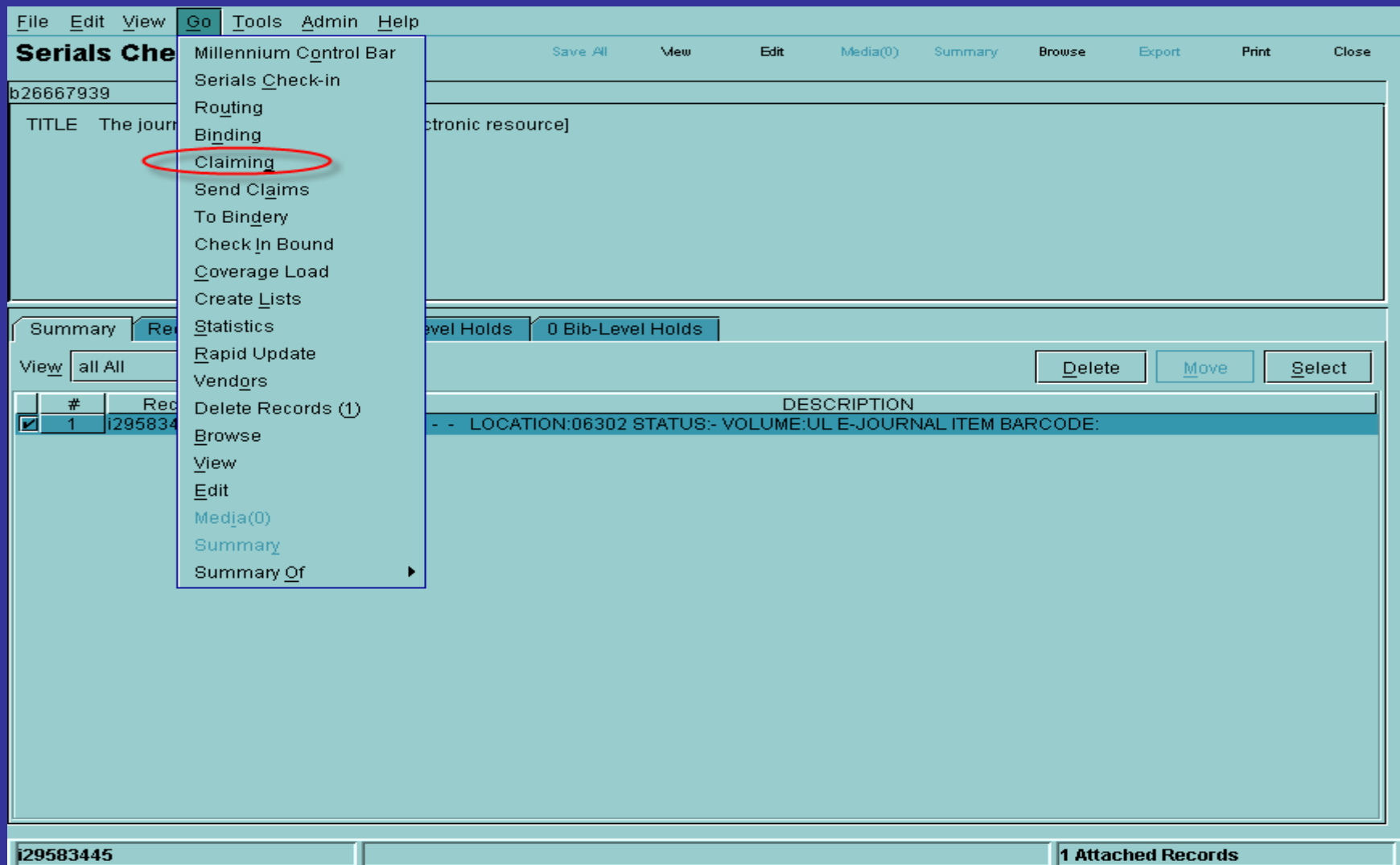
9 boxes

Running eTracker



- **Two options**
- **MilSer global claim program**
- **ERM range/review edit file**
- **Easy for staff with serials claiming experience**
- **Consistency - schedule time to run**

Running eTracker in MiLSer



Select review & file to run

File Edit View Go Tools Admin Help

Claiming View Edit Media(0) Summary Print

Review Review file: T Project (23467) (Item Records) Start Claim All

MARC Leader
CALL #
AUTHOR
TITLE
EDITION
IMPRINT
DESCRIPT'N
SERIES
NOTES

SCODE4=e (de 25Sep07) (286) (Checkin Records)
SCODE4=1 (A-B) (mj 25sep07) (1828) (Checkin Records)
SCODE4=2 (C-F) (mj 25sep07) (1127) (Checkin Records)
SCODE4=3 (G-K) (mj 25sep07) (1271) (Checkin Records)
SCODE4=4 (L-P) (mj 25sep07) (1209) (Checkin Records)
SCODE4=5 (Q-Z) (mj 25sep07) (1040) (Checkin Records)
SCODE4=f (FHSL) (mj 25sep07) (2252) (Checkin Records)
SCODE4=l (LAKE) (mj 25sep07) (254) (Checkin Records)

Summary 0 Bib-Level Holds

File selected & click start

File Edit View Go Tools Admin Help

Claiming View Edit Media(0) Summary Print

Review Review file: **8CODE4=e (de 25Sep07) (286) (Checkin Records)** Start Claim All

MARC Leader
CALL #
AUTHOR
TITLE
EDITION
IMPRINT
DESCRIPT'N
SERIES
NOTES

Summary 0 Bib-Level Holds

Running eTracker in ERM

The screenshot shows the eTracker application window. The menu bar includes File, Edit, View, Go, Tools, Admin, and Help. The Tools menu is open, showing options like Character Map, Search, and Limit. The Search option is expanded, showing sub-options: Browse (selected with a radio button) and Range (highlighted with a red circle). The main window area is divided into sections for Resource Name, Coverage, Resource URL, and PDA Access. Below this, there is a search bar with a dropdown menu set to 'y RESOURCE NAME' and a text input field containing 'acppier'. To the right of the search bar are buttons for Search, Expand All, Remote, and Select. At the bottom, there is a table with columns for #, RESOURCE NAME, and # ENTRIES.

File Edit View Go **Tools** Admin Help

Edit Functions Character Map New Limit View Edit Media(0) Summary Browse Print Close

Search ☒ Browse
Limit ☐ Range

Resource Name
Coverage
Resource URL
PDA Access

Index: y RESOURCE NAME ▼ acppier Search Expand All Remote Select

#	RESOURCE NAME	# ENTRIES
---	---------------	-----------

Select review from pull down index

File Edit View Go Tools Admin Help

Edit Functions View Edit Media(0) Summary Print

Range Start b10000008 Stop b27733658 Start

Range
Review
Index
Advanced
PDA Access

Summary 0 Bits-Level Holds

Select create list file from pull down menu

File Edit View Go Tools Admin Help

Edit Functions View Edit Media(0) Summary Print

Review Review file: T Project (23467) (Item Records) Start

Resource Name
Coverage
Resource URL
PDA Access

SCODE4=e (de 25Sep07) (286) (Checkin Records)
SCODE4=1 (A-B) (mj 13jul07) (1829) (Checkin Records)
SCODE4=2 (C-F) (mj 13jul07) (1127) (Checkin Records)
SCODE4=3 (G-K) (mj 13jul07) (1271) (Checkin Records)
SCODE4=4 (L-P) (mj 13jul07) (1195) (Checkin Records)
SCODE4=5 (Q-Z) (mj 13jul07) (1029) (Checkin Records)
SCODE4=f (FHSL) (mj 13jul07) (2212) (Checkin Records)
SCODE4=l (LAKE) (mj 13jul07) (254) (Checkin Records)

Summary 0 Bit-Level Holds

eTracker list selected

File Edit View Go Tools Admin Help

Edit Functions

View

Edit

Media(0)

Summary

Print

Review ▼

Review file:

SCODE4=e (de 25Sep07) (286) (Checkin Records)

Start

Resource Name
Coverage
Resource URL
PDA Access

Summary

0 Bit-Level Holds



Caveats

■ MilSer

- Only records with late “flag” boxes will pull up
- Good for keeping tabs on eProblems
- Good for testing access

■ ERM

- All records pop up
- Good for systematic updating of records
- Good for projects

eTracker in action



File Edit View Go Tools Admin Help

Claiming

Save View Edit Media(0) Summary Print

Review

Current 13 of 286

Back

Next

Jump

Stop

b22967722

TITLE Journal of the American Chemical Society [electronic resource]

LOCATIONS 062ga, 063ga

Summary

Record c1360590

Card c1360590

Holdings c1360590

Routing c1360590(0)

0 Bib-Level Holds

Claim One

Claim All

Last payment

No Order Record Attached

UNAVAILABLE 05-01-2007 LATEST ISSUE NOT AVA S	UNAVAILABLE 05-01-2007 NOTIFIED OL S	UNAVAILABLE 05-01-2007 WAITING ON OL...	ARRIVED 06-05-2007 ISSUE ACCESSIBLE S	LATE 06-25-2007 ACCESS TEST	EXPECTED 12-25-2007 ACCESS TEST
EXPECTED 06-25-2008 ACCESS TEST	EXPECTED 12-25-2008 ACCESS TEST				

8 boxes

Another eTracker - test access

File Edit View Go Tools Admin Help

Claiming Save View Edit Media(0) Summary Print

Review Current of

b2645712x

TITLE Factiva [electronic resource]

LOCATIONS 062ga, 063ga

Summary Record c1360474 Card c1360474 Holdings c1360474 Routing c1360474(0) 0 Bib-Level Holds

Last payment PAID: 01-25-2007 INV# 01-10-2006 INV# 32067 AMT: \$6,200.00 NOTE: 001 copies 09/01/06-10/31/07 VOUCHER: 40359

UNAVAILABLE 02-17-2007 OLINKS NOT WORKING S	UNAVAILABLE 02-19-2007 NOTIFIED FACTIVA S	UNAVAILABLE 02-19-2007 NOTIFIED FACTIVA #2 S	UNAVAILABLE 02-17-2007 FACTIVA RESPONSE -- S	UNAVAILABLE 02-17-2007 NOTIFIED FACTIVA #3 S	UNAVAILABLE 02-17-2007 NOTIFIED OL S
UNAVAILABLE 02-18-2007 OL RESPONSE S	ARRIVED 02-18-2007 NOTIFIED FACTIVA #4 S	NOT PUBLISHED 02-18-2007 KNOWN PROBLEM *	LATE 09-15-2007 ACCESS TEST	EXPECTED 03-15-2008 ACCESS TEST	EXPECTED 09-15-2008 ACCESS TEST
EXPECTED 03-15-2009 ACCESS TEST	EXPECTED 09-15-2009 ACCESS TEST				

14 boxes

Access confirmed - "arrived"

File Edit View Go Tools Admin Help

Claiming Save View Edit Media(0) Summary Print

Review Current 12 of 286 Back Next Jump Stop

b2645712x

TITLE Factiva [electronic resource]

LOCATIONS 062ga, 063ga

Summary Record c1360474 Card c1360474 Holdings c1360474 Routing c1360474(0) 0 Bib-Level Holds

Claim One Claim All

Last payment PAID: 01-25-2007 INVD: 01-10-2006 INV#: 32067 AMT: \$6,200.00 NOTE: 001 copies 09/01/06-10/31/07 VOUCHER: 40359

UNAVAILABLE 02-17-2007 OLINKS NOT WORKING S	UNAVAILABLE 02-19-2007 NOTIFIED FACTIVA S	UNAVAILABLE 02-19-2007 NOTIFIED FACTIVA #2 S	UNAVAILABLE 02-17-2007 FACTIVA RESPONSE -- S	UNAVAILABLE 02-17-2007 NOTIFIED FACTIVA #3 S	UNAVAILABLE 02-17-2007 NOTIFIED OL S
UNAVAILABLE 02-18-2007 OL RESPONSE S	ARRIVED 02-18-2007 NOTIFIED FACTIVA #4 S	NOT PUBLISHED 02-18-2007 KNOWN PROBLEM *	ARRIVED 09-15-2007 ACCESS TEST	EXPECTED 03-15-2008 ACCESS TEST	EXPECTED 09-15-2008 ACCESS TEST
EXPECTED 03-15-2009 ACCESS TEST	EXPECTED 09-15-2009 ACCESS TEST				

14 boxes

Inquiring minds want to know...

File Edit View Go Tools Admin Help

Edit Functions Save View Edit Media() Summary Print

Review Current 51 of 286 Previous Next Stop

b26057062

TITLE ACP PIER [electronic resource] : the Physicians' Information a

Summary Record c1361247 Card c1361247 Holdings c1361247

Check-in date W

UNAVAILABLE 06-28-2007 RDATE INQUIRY S	LATE 09-15-2007 RDATE INQUIRY	EXPECTED 11-01-2007 ACCESS TEST
-------------------------------------------------	-------------------------------------	---------------------------------------

Modify Boxes Individually

Status E EXPECTED

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 09-15-2007

Enumeration

Levels v. no.

Claims written 0

Total copies received 0

URL

Public Note RDATE INQUIRY

Staff Note Ask MJ if decision was made re which rdate to use

Suppress From Public Display ☐

OK Cancel

6 boxes

Send another tickler...

File Edit View Go Tools Admin Help

Edit Functions Insert Save View Edit Media(0) Summary Vendor Print

Review Current 51 of 286 Previous Next Stop

b26057062

TITLE ACP PIER [electronic resource] : the Physicians' Information and Education Resource

Insert a non-MARC field

Name:	RDATE QUESTION
Date(YYYYMMDD):	20070926
Send to:	martin.jenkins@wright.edu, kathleen.hennessy@wright.edu
Subject:	RDATE question follow-up
Header:	Hi all, Has a decision been made on which rdate to use in a record? Any decision yet on whether new order records will be created when we revend or will the same order record be used? For example, see ACP PIER (Revended to Stat!Ref from Clinical Pharmacology)
Footer:	Thanks, Deberah

OK Cancel

c1361

LABEL ORDE DISPL COPIE

MARC Leader #####ny 22#####3n 4500

MARC DISPL 856 4 1 <http://ezproxy.libraries.wright.edu:2048/login?url=http://online.statref.com/Document.aspx?grpalias=WSUPIER&Fid=92&DocId=1>

Ticklerlog

Name:	RDATE QUESTION
Event Date:	20070710
Request Date:	20070710
Sent to:	martin.jenkins@wright.edu, karen.wilhoit@wright.edu, kathleen.hennessy@wright.edu
Subject:	RDATE QUESTION follow-up
Header:	Good morning all! Have you made a decision on which rdate to use in a record? Or, are you going to create new order records when we revend a title (e.g. ACP PIER)
	Thanks, Deberah

INT. NOTE ERM Link

DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE
SLK#1000272

c1361247 Edit Mode (INS)

Both ticklers retained in record

File Edit View Go Tools Admin Help	
Edit Functions	
<div> <div>Review</div> <div>Current 51 of 286</div> <div>Previous</div> <div>Next</div> <div>Stop</div> </div>	
b26057062	
TITLE ACP PIER [electronic resource] : the Physicians' Information and Education Resource	
<div>Summary</div> <div>Record c1361247</div> <div>Card c1361247</div> <div>Holdings c1361247</div> <div>Routing c1361247(0)</div> <div>0 Bib-Level Holds</div>	
c1361247 Last Updated: 09-25-2007 Created: 06-28-2007 Revisions: 8	
ORDERED BY	LOCATION 06302 UL e-journal
DISPLAY s NDLOC/NOCON	RLOC e UL E-RESOURCE
COPIES 1	VENDOR
SCODE4 e E-RESOURCES	UPDCNT
PCOUNT 0	
MARC Leader #####ny 22####3p 4500 Tickler	
Name:	RDATE QUESTION
Date(YYYYMMDD):	20070927
Send to:	martin.jenkins@wright.edu, kathleen.hennessy@wright.edu
Subject:	RDATE question follow-up
Header:	Hi all, Has a decision been made on which rdate to use in a record? Any decision yet on whether new order records will be created when we revend or will the same order record be used? For example, see ACP PIER (Revended to Stat!Ref from Clinical Pharmacology)
Footer:	Thanks, Deberah
MARC DISPL 856 4 1 http://ezproxy.libraries.wright.edu:2048/login?url=http://online.statref.com/Document.aspx?realias=VWSUPIER&Fld=92&DocId=1 Ticklerlog	
Name:	RDATE QUESTION
Event Date:	20070710
Request Date:	20070710
Sent to:	martin.jenkins@wright.edu, karen.wilhoit@wright.edu, kathleen.hennessy@wright.edu
Subject:	RDATE QUESTION follow-up
Header:	Good morning all! Have you made a decision on which rdate to use in a record? Or, are you going to create new order records when we revend a title (e.g. ACP PIER)
	Thanks, Deberah
INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE	
c1361247	
Edit Mode (OVR)	

Deberah England, ER&L 3/20/08

Card shows waiting for a response

File Edit View Go Tools Admin Help

Serials Check-in

Save

b26057062

TITLE ACP PIER [electronic resource] : the Physicians' Information and Ed

LOCATIONS 06302

Summary Record c1361247 Card c1361247 Holdings c1361247

Check-in date Thurs Sep 27 2007 ☒ Prior

UNAVAILABLE 06-28-2007 RDATE INQUIRY S	UNAVAILABLE 09-15-2007 RDATE INQUIRY S	EXPECTED 10-02-2007 AWAITING RESPONSE
EXPECTED 05-01-2009 ACCESS TEST		

7 boxes

Modify Boxes Individually

Status **E EXPECTED**

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date

Enumeration

Levels v. no.

Claims written

Total copies received

URL

Public Note
AWAITING RESPONSE

Staff Note
from MJ re rdate (de 25Sep07)

Suppress From Public Display ☐

OK Cancel



eTracker Periodic access tests

■ Decision making

- Determine how often you want to run access tests
- Determine how to access the resource
- Determine what to check for access

■ Record creation

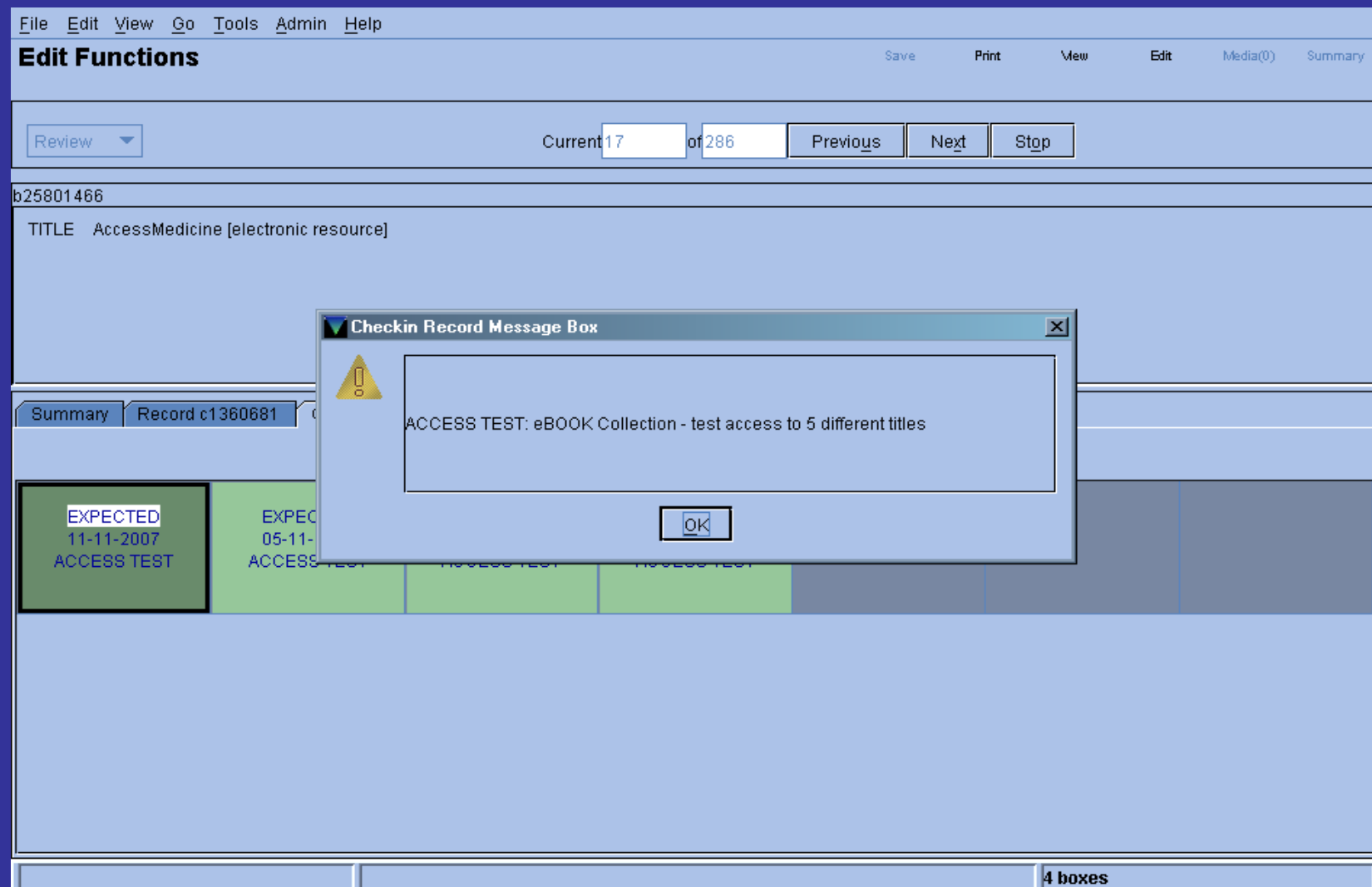
- Create or update holdings record
- Set or update card parameters
- Create boxes

■ Delegate testing to staff and/or students

eTracker: Access Test template

E-TRACKER		Template: PERIODIC ACCESS TESTS			
Status	ARRIVED	EXPECTED	EXPECTED	UNAVAILABLE	
Represent s test status	Accessible	Future test	Future test	Inaccessible	
Transactio n Date	Date Access verified	Date set to test	Date set to test	Date access test failed	
Action steps	Test failed; I				
Public display box	NA	<Frequency of test - semiannual>		Problem description	
Staff display box	Name or initials of who verified access			Party who ran test	
Suppressio n	NA	NA	NA	NA	

eTracker pop up message



eTracker: Access test record

File Edit View Go Tools Admin Help

Edit Functions

Save

Print

Insert

View

Edit

Media(0)

Summary

Vendor

Review

Current 17 of 286

Previous

Next

Stop

b25801466

TITLE AccessMedicine [electronic resource]

Summary

Record c1360681

Card c1360681

Holdings c1360681

Routing c1360681(0)

0 Bib-Level Holds

c1360681 Last Updated: 09-27-2007 Created: 05-15-2007 Revisions: 9

LABEL TYPE		CLAIMON	02-10-2008	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e ULE-RESOURCE	UPDCNT	
COPIES	1	VENDOR	mcgra McGraw-Hill Inc.	PCOUNT	0

MARC Leader #####ny 22####3n 4500

MARC DISPL 856 4 0 <http://ezproxy.libraries.wright.edu:2048/login?url=http://www.accessmedicine.com/home.aspx>

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

CMESAGE ACCESS TEST: eBook Collection - test access to 5 different titles

ERM Link SL Ke1000269

c1360681

Edit Mode (INS)

Access test parameters

File Edit View Go Tools Admin Help

Edit Functions Save Print View Edit Media(0) Summary

Review

b25801466

TITLE AccessMedicine [e

Summary Record c136

EXPECTED
11-11-2007
ACCESS TEST

Edit Card

Status C Current

Display mode C Box Display

Order record o3531727

☐ Create item during check-in

☐ Suppress OPAC display

Issues Supplements Indexes

Captions and Pattern for Issues

Frequency f Semiannual

Enumeration

Number of levels 2

Chronology Captions

Level	Caption	Display
Level1	year	<input type="checkbox"/>
Level2	month	<input type="checkbox"/>
Level3	day	<input type="checkbox"/>

1 v. ☐ Mode n Numeric

2 no. ☐ Mode n Numeric

Pieces per level 0

Numbering continuity r Restart

Claiming Binding

Days before claim 91

Unit of binding 0

Binding delay 0

Alternate Enumeration

Number of levels 0

Simple

OK Cancel

4 boxes

Access test add terms to boxes

File Edit View Go Tools Admin Help

Edit Functions Save View Edit Media(0) Summary Browse Vendor Print Close

b26667939

TITLE The journal of genetic genealogy [electronic resource]
IMPRINT [United States] : Journal of Genetic Genealogy, c2005-
ADDED NAME SPARC (Organization)

Summary New CHECKIN New Card New Holdings New Routing 0 Bib-Level Holds

Check-in date Wed Sep 26 2007 ☒ Print labels ☐ Create item

EXPECTED 09-26-2007	EXPECTED 03-26-2008	EXPECTED 09-26-2008	EXPECTED 03-26-2009			
------------------------	------------------------	------------------------	------------------------	--	--	--

Create card

Box Menu

Advanced Options

Card Menu

Card Display

Card Function

Undo Ctrl-Z

Redo Ctrl-Y

4 boxes

Access terms added as a group

File Edit View Go Tools Admin Help

Edit Functions Save View Edit Media(M) Summary Browse Vendor Print Close

b26667939

TITLE The journal of genetic genealogy [electronic resource]
IMPRINT [United States] : Journal of Genetic Genealogy, c2005-
ADDED NAME SPARC (Organization)

Summary New CHECKIN New Card New Holdings New Routing 0 Bib-Leve

Check-in date Wed Sep 26 2007 ☒ Print labels

EXPECTED 09-26-2007	EXPECTED 03-26-2008	EXPECTED 09-26-2008	EXPECTED 03-26-2009
------------------------	------------------------	------------------------	------------------------

Update Boxes as a Group [X]

☐ Status E EXPECTED

Cover Expected Dates

☐ Cover date Month/Season Day Year

☐ Expected date 09-26-2007

☐ Increment transaction dates

Enumeration

☐ Levels (v.) (no.)

☐ Claims written 0

☐ Total copies received 0

☐ URL

☒ Public Note ACCESS TEST

☐ Staff Note

Public Display

☐ Show Public Display

☐ Suppress From Public Display

OK Cancel

4 boxes

Check access using URL in record

File Edit View Go Tools Admin Help

Edit Functions Insert Save View Edit Media(0) Summary Vendor Print

Review Current 176 of 286 Previous Next Stop

b21149471

TITLE INSPEC [electronic resource]
LCCN sn 99048838

Summary Record c1364571 Card c1364571 Holdings c1364571 Routing c1364571(0) 0 Bib-Level Holds

c1364571 Last Updated: 09-26-2007 Created: 09-26-2007 Revisions: 3

LABEL TYPE		CLAIMON	- -	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e UL E-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

MARC Leader #####ny 22####3n 4500

MARC DISPL 856 4 0 <http://ezproxy.libraries.wright.edu:2048/login?url=http://www.ebsi.com/ul/etphases/login/ins0>

IDENTITY INSPEC Archives

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES

ERM Link SLKe1000137

Cut Ctrl-X
Copy Ctrl-C
Paste Ctrl-V
Edit Field Ctrl-E
Insert Field Ctrl-I
Delete Field Ctrl-D
Open URL
Move to Top of Group
Move to Bottom of Group
Move Up(H)
Move Down
Change to non-MARC
MARC Tag Info
Preferences
Substitution Phrases

c1364571 Edit Mode (INS)



Additional eMaintenance

■ Tracking

- new titles
- publisher or title changes
- publisher processes
- policy or procedural issues
- resources with supplements & in-bedded titles
- functionality

■ Access advisories

■ Known problems

Forthcoming titles in ERM

File Edit View Go Tools Admin Help																													
Edit Functions		Insert	Save	View	Edit																								
Summary Browse Print Close																													
e10000124 Last Updated: 09-24-2007 Created: 10-16-2006 Revisions: 14																													
Rights Type	- NOT EVALUATED	Trial Begin Date	- -	Access Provider	none																								
Suppress	s NDLOC/NOCON	Trial End Date	- -	Publisher	none																								
Access	w WSU	Renewal Date	- -	Copyright Holder	none																								
Frequency	- NONE	Registration Date	- -	Data Provider	none																								
Resource Code 4	- NONE	Activation Date	- -	Consortium	none																								
Resource Status	z TROUBLE	Termination Date	- -																										
<p>Resource Name IEEE Xplore --NEW TITLES -- TEMPORARY RECORD</p> <p>Notes Per ltr from IEEE in Oct06 5 new titles due in Mar07; one title due Sep06. See notes for titles</p> <p>Notes 2008 new titles from eml on 19Sep07 to Phil & DE from Barry Holquist (b.holquist@ieee.org) (de 24Sep07)</p> <p>Notes Due Mar07: IEEE transactions on biomedical circuits and systems [pub v.1:1 dated Mar2007]</p> <p>Notes Due Mar07: IEEE industrial electronics magazine [pub v.1:1 dated Spring 2007]</p> <p>Notes Due Mar07: IEEE nanotechnology magazine</p> <p>Notes Due Mar07: IEEE transactions on network and service management [publ v.4:1 Jun 2007]</p> <p>Notes Due Mar07: IEEE journal of selected topics in signal processing [publ v.1:1 dated Jun2007]</p> <p>Notes Due Sep06: IEEE systems journal [not yet pub - de 16Oct06] [publ v.1:1 dated Sept2007]</p> <p>Notes Due 2008: IEEE Transactions on Haptics</p> <p>Notes Due 2008: IEEE Transactions on Learning Technologies</p> <p>Notes Due 2008: IEEE Journal of Selected Topics in Applied Earth Observations and Remote Sensing</p> <p>Notes Due 2008: IEEE Reviews in Biomedical Engineering</p> <p>Notes Due 2008: IEEE Transactions on Services Computing</p> <p>Notes Due 2008: IEEE Intelligent Transportation Systems Magazine</p> <p>Notes NEW TITLES NOT YET PUBLISHED (de 2May07) All 06/07 titles publ but Nanotechnology Magazine (de 24Sep07)</p> <p>Notes NOTIFIED Phil Flynn re new 2007 titles via email (de 16Oct06; 2May07; 15Jun07)</p> <p>Notes DELETE RECORD ONCE ALL TITLES ARE AVAILABLE (de 2May07)</p> <p>Resource Managmt. Tickler</p> <table border="1"> <tr><td>Name:</td><td>Deberah</td></tr> <tr><td>Date(YYYYMMDD):</td><td>20071001</td></tr> <tr><td>Send to:</td><td>deberah.england@wright.edu</td></tr> <tr><td>Subject:</td><td>ACTIVATE IEEE X new titles</td></tr> <tr><td>Header:</td><td>http://ieeexplorer.ieee.org/xpl/periodicals.jsp</td></tr> <tr><td>Footer:</td><td>Verify if published and notify Phil</td></tr> </table> <p>Tickler Log</p> <table border="1"> <tr><td>Name:</td><td>Deberah</td></tr> <tr><td>Event Date:</td><td>20070901</td></tr> <tr><td>Fixed Field Date:</td><td>20070901</td></tr> <tr><td>Sent to:</td><td>deberah.england@wright.edu, martin.jenkins@wright.edu</td></tr> <tr><td>Subject:</td><td>ACTIVATE 6 NEW TITLES: see IEEE Xplorer</td></tr> <tr><td>Header:</td><td>http://ieeexplore.ieee.org/xpl/periodicals.jsp</td></tr> </table>						Name:	Deberah	Date(YYYYMMDD):	20071001	Send to:	deberah.england@wright.edu	Subject:	ACTIVATE IEEE X new titles	Header:	http://ieeexplorer.ieee.org/xpl/periodicals.jsp	Footer:	Verify if published and notify Phil	Name:	Deberah	Event Date:	20070901	Fixed Field Date:	20070901	Sent to:	deberah.england@wright.edu, martin.jenkins@wright.edu	Subject:	ACTIVATE 6 NEW TITLES: see IEEE Xplorer	Header:	http://ieeexplore.ieee.org/xpl/periodicals.jsp
Name:	Deberah																												
Date(YYYYMMDD):	20071001																												
Send to:	deberah.england@wright.edu																												
Subject:	ACTIVATE IEEE X new titles																												
Header:	http://ieeexplorer.ieee.org/xpl/periodicals.jsp																												
Footer:	Verify if published and notify Phil																												
Name:	Deberah																												
Event Date:	20070901																												
Fixed Field Date:	20070901																												
Sent to:	deberah.england@wright.edu, martin.jenkins@wright.edu																												
Subject:	ACTIVATE 6 NEW TITLES: see IEEE Xplorer																												
Header:	http://ieeexplore.ieee.org/xpl/periodicals.jsp																												

eTracker: Forthcoming titles

File Edit View Go Tools Admin Help

Serials Check-in Insert Save New Edit Media(0) Summary Browse Export Vendor Print Close

b22133033

TITLE IEEE Xplore [electronic resource]

LOCATIONS 06302

Summary Record c1364649 Card c1364649 Holdings c1364649 Routing c1364649(0) 0 Bib-Level Holds

c1364649 Last Updated: 09-26-2007 Created: 09-26-2007 Revisions: 3

LABEL TYPE		CLAIMON	01-04-2008	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e UL E-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

MARC Leader #####ny 22####3n 4500

IDENTITY NEW TITLES

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

INT. NOTE Per ltr from IEEE in Oct06 5 new titles due in Mar07; one title due Sep06. See notes for titles

INT. NOTE NEW TITLES NOT YET PUBLISHED (de 2May07) All 06/07 titles published Nanotechnology Magazine (de 24Sep07)

INT. NOTE 2008 new titles from emi on 19Sep07 to Phil & DE from Barry Holquist (b.holquist@ieee.org) (de 24Sep07)

INT. NOTE NOTIFIED Phil Flynn re new 2007 titles via email (de 16Oct06; 2May07; 15Jun07)

INT. NOTE DELETE RECORD ONCE ALL TITLES ARE AVAILABLE (de 2May07)

ERM Link SLKe1000132

INT. NOTE <http://ieeexplorer.ieee.org/xpl/periodicals.jsp>

BIND TITLE Due 2008: IEEE Transactions on Haptics

BIND TITLE Due 2008: IEEE Transactions on Learning Technologies

BIND TITLE Due 2008: IEEE Journal of Selected Topics in Applied Earth Observations and Remote Sensing

BIND TITLE Due 2008: IEEE Reviews in Biomedical Engineering

BIND TITLE Due 2008: IEEE Transactions on Services Computing

BIND TITLE Due 2008: IEEE Intelligent Transportation Systems Magazine

BIND TITLE Due Mar07: IEEE transactions on biomedical circuits and systems [pub v.1:1 dated Mar2007]

BIND TITLE Due Mar07: IEEE industrial electronics magazine [pub v.1:1 dated Spring 2007]

BIND TITLE Due Mar07: IEEE nanotechnology magazine

BIND TITLE Due Mar07: IEEE transactions on network and service management [publ v.4:1 Jun 2007]

BIND TITLE Due Mar07: IEEE journal of selected topics in signal processing [publ v.1:1 dated Jun2007]

BIND TITLE Due Sep06: IEEE systems journal [not yet pub - de 16Oct06] [publ v.1:1 dated Sept2007]

Tickler

Name:	Check if Matt added new 2007 titles to SS & Notify Phil
Date(YYYYMMDD):	20071001
Send to:	deberah.england@wright.edu

c1364649 Edit Mode (INS)

Forthcoming titles parameters altered

Status

Display mode

☐ Create item during check-in

Order record

☐ Suppress OPAC display

Issues Supplements Indexes

Captions and Pattern for Issues

Frequency

Chronology Captions

Level	Caption	Display
Level1	<input type="text" value="year"/>	<input type="checkbox"/>
Level2	<input type="text" value="month"/>	<input type="checkbox"/>
Level3	<input type="text" value="day"/>	<input type="checkbox"/>

Enumeration

Number of levels

	Caption	Display	Mode	Pieces per level	Numbering continuity
1	<input type="text" value="v."/>	<input type="checkbox"/>	<input type="text" value="n Numeric"/> <input type="button" value="v"/>		
2	<input type="text" value="no."/>	<input type="checkbox"/>	<input type="text" value="n Numeric"/> <input type="button" value="v"/>	<input type="text" value="0"/> <input type="button" value="v"/>	<input type="text" value="r Restart"/> <input type="button" value="v"/>

Alternate Enumeration

Number of levels

Claiming Binding

Days before claim

Unit of binding

Binding delay

Forthcoming titles monitoring

File Edit View Go Tools Admin Help

Serials Check-in

b22133033

TITLE IEEE Xplore [electronic resource]

LOCATIONS 06302

Summary Record c1364649 Card c1364649 Holdings c1364649

Check-in date Wed Sep 26 2007

EXPECTED 11-20-2007 VERIFY NEW TITLES	EXPECTED 12-20-2007 VERIFY NEW TITLES	EXPECTED 01-20-2008 VERIFY NEW TITLES	EXPECTED 02-20-2008 VERIFY NEW TITLES

Modify Boxes Individually

Status **E EXPECTED**

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 11-20-2007

Enumeration

Levels (v.) (no.)

Claims written 0

Total copies received 0

URL

Public Note
VERIFY NEW TITLES ADDED

Staff Note

Suppress From Public Display ☐

OK Cancel

Print Close

4 boxes

Forthcoming titles separate record

File Edit View Go Tools Admin Help

Serials Check-in Save All View Edit Media(0) Summary Browse Export Print Close

b22133033

TITLE IEEE Xplore [electronic resource]

LOCATIONS 06302

Summary Record c1364649 Card c1364649 Holdings c1364649 Routing c1364649(0) 0 Bib-Level Holds

View c Checkin Attach New Checkin Delete Move Select Add Related Resource Remove Related Resource

	#	Record Number	COPIES	LOCATION	IDENTITY	STATUS ▲	FREQUENCY	BOXES
<input type="checkbox"/>	1	c1363244	1	06302		Current	Semiannual	4
<input checked="" type="checkbox"/>	2	c1364649	1	06302	NEW TITLES	Current	Monthly	4

c1364649 2 Attached Checkin Records

Record linked in ERM

File Edit View Go Tools Admin Help

Edit Functions Save All View Edit Summary Browse Print Close

e10001323

Resource Name IEEE Xplore
Notes Institute of
Resource URL http://ezproxy.libraries.wright.edu:2048/login?url=http://www.ieee.org/ieeexplore
Resource URL FRANCIS URL: http://www.libraries.wright.edu/quicklinks/databases/database.php?dbid=110&direct=connect
Coverage Full text: 1998-present; Table of Contents 1998-present (select publications)

Summary Contacts Financial Usage Statistics

View all All Delete Move Select

#	Record Number	DESCRIPTION
<input checked="" type="checkbox"/>	1 o2839568	LOCATION:06302 FUND:1 ejnl STATUS:f PAY NOTE:INV TITLE: IEEE All-Society Periodicals Package (ASPP) IDENTITY:ONLINE
<input type="checkbox"/>	2 c1363244	COPIES:1 LOCATION:06302 Resource ID: IDENTITY: STATUS:Current FREQUENCY:Semiannual BOXES:4
<input type="checkbox"/>	3 c1364649	COPIES:1 LOCATION:06302 Resource ID: IDENTITY:NEW TITLES STATUS:Current FREQUENCY:Monthly BOXES:4

o2839568 3 Attached Records

c1364649

Opens browser & loads page

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RELEASE 2.4

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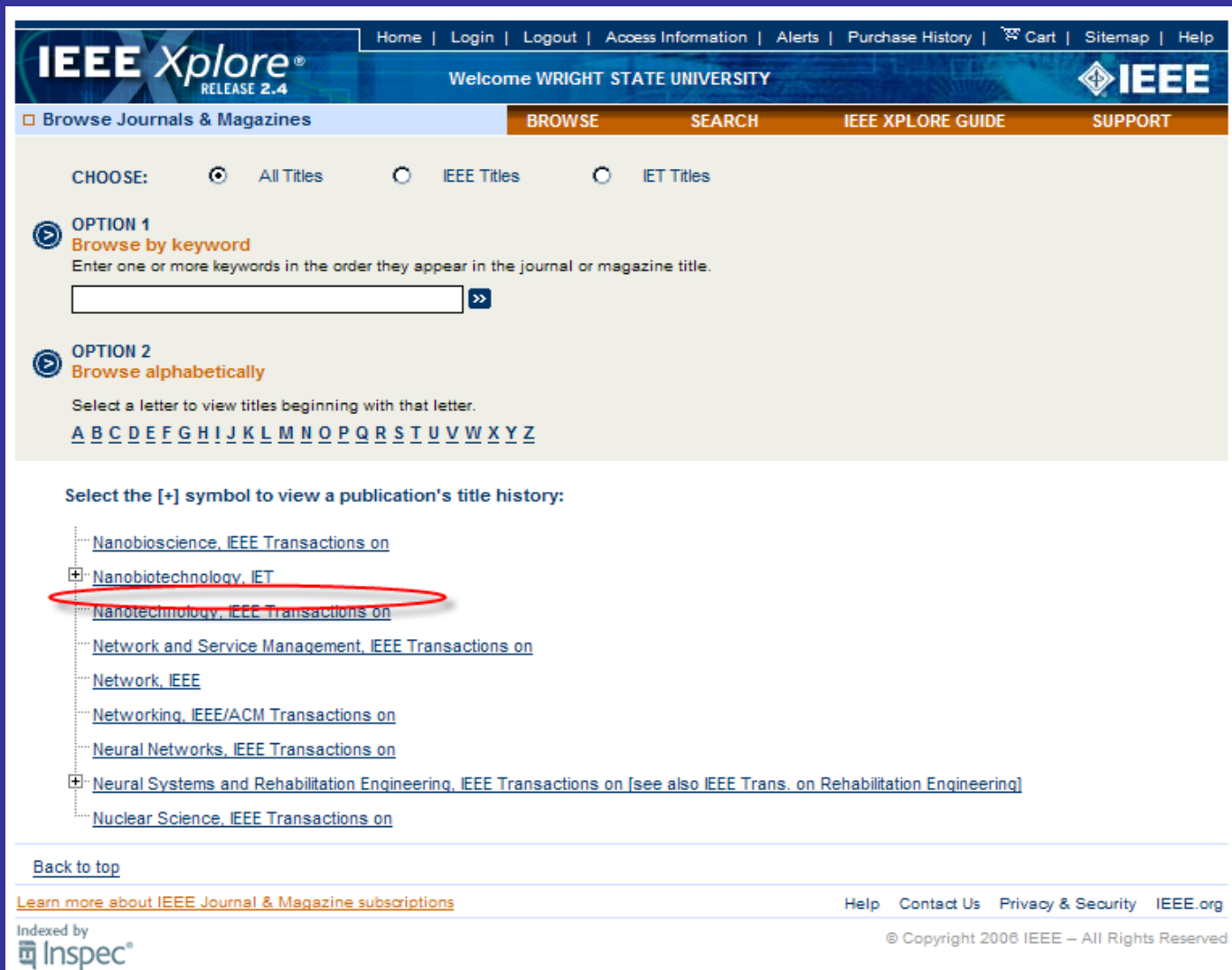
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Title not yet published



The screenshot shows the IEEE Xplore website interface. At the top, there is a navigation bar with links: Home, Login, Logout, Access Information, Alerts, Purchase History, Cart, Sitemap, and Help. Below this, a banner reads "Welcome WRIGHT STATE UNIVERSITY" with the IEEE logo. The main navigation bar includes "Browse Journals & Magazines", "BROWSE", "SEARCH", "IEEE XPLORE GUIDE", and "SUPPORT".

Under "Browse Journals & Magazines", there is a "CHOOSE:" section with three radio buttons: "All Titles" (selected), "IEEE Titles", and "IET Titles".

Below this, there are two options:

- OPTION 1**
Browse by keyword
Enter one or more keywords in the order they appear in the journal or magazine title.
A search input field with a "»" button.
- OPTION 2**
Browse alphabetically
Select a letter to view titles beginning with that letter.
A row of letters: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Below the options, there is a section titled "Select the [+] symbol to view a publication's title history:". It contains a list of publications with expand/collapse symbols (+/-) to the left:

- Nanobioscience, IEEE Transactions on
- Nanobiotechnology, IET** (This item is circled in red)
- Nanotechnology, IEEE Transactions on
- Network and Service Management, IEEE Transactions on
- Network, IEEE
- Networking, IEEE/ACM Transactions on
- Neural Networks, IEEE Transactions on
- Neural Systems and Rehabilitation Engineering, IEEE Transactions on [see also IEEE Trans. on Rehabilitation Engineering]
- Nuclear Science, IEEE Transactions on

At the bottom left, there is a "Back to top" link. Below that, a link says "Learn more about IEEE Journal & Magazine subscriptions". At the bottom right, there are links for "Help", "Contact Us", "Privacy & Security", and "IEEE.org". The footer also includes "Indexed by Inspec" and "© Copyright 2006 IEEE – All Rights Reserved".

eTracker: Publisher changes

File Edit View Go Tools Admin Help

Serials Check-in Save View Edit Media(0) Summary Print

Review Current

b27600361

TITLE Bulletin of the Australian Mathematical Society [electronic re

LOCATIONS 06302

Summary Record c1361983 Card c1361983 Holdings c1

Check-in date Tue Sep 25 200

EXPECTED 01-02-2008 PUBL CHANGE	EXPECTED 01-19-2008 ACCESS TEST	EXPECTED 07-19-2008 ACCESS TEST
---------------------------------------	---------------------------------------	---------------------------------------

Modify Boxes Individually

Status E EXPECTED

Cover Expected Dates

Cover date Month/Season Day Year

Expected date 01-02-2008

Enumeration

Levels (v.)

(no.)

Claims written 0

Total copies received 0

URL

Public Note PUBL CHANGE

Staff Note Switching from OZ Math Pub Assn to Cambri
dge U Press after 31Dec07; Check access

Suppress From Public Display ☐

OK Cancel

eTracker: Publisher processes

File Edit View Go Tools Adm

Edit Functions
b22983302
TITLE The New England journal of medicine
LCCN 00227354
Summary Record c1359873

UNAVAILABLE 02-26-2007 REQ LOGON & PWD \$ 1	UNAVAILABLE 02-26-2007 NOTIFIED \$ 1
EXPECTED 08-12-2007 ACCESS TEST	EXPECTED 02-12-2007 ACCESS TEST

Modify Boxes Individually

Status E EXPECTED
Cover Expected Dates

Month/Season	Day	Year

Cover_date
Expected date 11-01-2007
Claims written 0
Total copies received 0
URL
Public Note WATCH FOR EML NOTICE
Staff Note regarding whether to renew; must return eml renewal notice in order to be invoiced (See e Prob from 2/27/07)
☐ Suppress From Public Display
OK Cancel

Edit Media(0) Summary Browse Print Close

0 Bib-Level Holds
Check In

ARRIVED 2-28-2007 SS RESOLVED \$ 1	ARRIVED 09-12-2007 ACCESS TEST 1	EXPECTED 11-01-2007 WATCH FOR EML NOT
------------------------------------------------	-------------------------------------------	---------------------------------------------

11 boxes

eTracker: Policy & procedures

File Edit View Go

Edit Functions

b21077010

TITLE OhioLINK Digit

Summary Record c

UNAVAILABLE
05-03-2007
LINK MISSING
S

EXPECTED
04-04-2008
ACCESS TEST

Modify Boxes Individually

Status E EXPECTED

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 10-04-2007

Enumeration

Levels

Claims written 0

Total copies received 0

URL

Public Note

Staff Note

Waiting for Response

From Karen or Kathi re policy issue

Suppress From Public Display ☐

OK Cancel

View Edit Media(0) Summary Browse Print Close

0619(0) 0 Bib-Level Holds

s ☐ Create item

UNAVAILABLE 09-25-2007 POLICY REQUEST	EXPECTED 10-04-2007 WAITING FOR RESPO	EXPECTED 10-01-2007 ACCESS TEST
---------------------------------------------	---------------------------------------------	---------------------------------------

10 boxes

eTracker: In-bedded titles

File Edit View Go Tools Admin Help

Edit Functions Save All View Edit Summary Browse Print Close

e10002108

Resource Name Thomson Resea
Notes Thomson Financ
Resource URL <http://ezproxy.libr>
Resource URL FRANCIS URL: p
Coverage Current 10 years

Summary Contacts Financial

View all All

#	Record Number
<input type="checkbox"/> 1	o2835344
<input checked="" type="checkbox"/> 2	c1363979
<input type="checkbox"/> 3	c1364510

Bib Record - c1363979

File Edit View Go Tools Help

Insert Save View Edit Media(0) Summary Browse Export Vendor

b22488716

TITLE Thomson research [electronic resource]

Summary Record c1363979 Card c1363979 Holdings c1363979 Routing c1363979(0) 0 Bib-Level Holds

c1363979 Last Updated: 09-25-2007 Created: 09-17-2007 Revisions: 3

LABEL TYPE		CLAIMON	- -	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOUR
DISPLAY	s NDLOC/NOCON	RLOC	e ULE-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

MARC Leader #####ny 22#####3n 4500

IDENTITY Thomson research
INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE
LIB. HAS Current 10 years
ERM Link SLKe1000210

c1363979 Edit Mode (INS

In-bedded titles separate record

File Edit View Go Tools Admin Help

Edit Functions Save All View Edit Summary Browse Print Close

e10002108

Resource Name Thomson Research
Notes Thomson Financial
Resource URL <http://ezproxy.libraries.wright.edu:2048/login?url=http://research.thomsonib.com/gaportal/?ExpressCode=ohiobasic>
Resource URL FRANCIS URL: <http://www.libraries.wright.edu/quicklinks/databases/database.php?dbid=190&direct=connect>
Coverage Current 10 years

Summary Contacts Financial Usage Statistics

View all All Delete Move Select

#	Record Number	DESCRIPTION
<input type="checkbox"/>	1 o2835344	LOCATION:06329 FUND:1otho STATUS:f PAY NOTE:Payment made via electronic 1100 form IDENTITY:
<input checked="" type="checkbox"/>	2 c1363979	COPIES:1 LOCATION:06302 Resource ID: IDENTITY:Thomson research STATUS:Current FREQUENCY:Semiannual BOX...
<input type="checkbox"/>	3 c1364510	COPIES:1 LOCATION:06302 Resource ID: IDENTITY:Thomson one banker STATUS:Current FREQUENCY:3 days between...

c1363979 3 Attached Records

eTracker: Supplements

File Edit View Go Tools Admin Help

Edit Functions

Insert

Save

View

Edit

Media(0)

Summary

Browse

Vendor

Print

Close

b23353041

TITLE The Astrophysical journal [electronic resource]
LCCN sn 96027582

NOTE Access limited to one simultaneous user. Please close browser window when exiting journal.

Summary

Record c1362082

Card c1362082

Holdings c1362082

Routing c1362082(0)

0 Bib-Level Holds

c1362082 Last Updated: 09-26-2007 Created: 09-10-2007 Revisions: 4

LABEL TYPE	■	CLAIMON	06-09-2008	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e UL E-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

MARC Leader #####ny 22#####3n 4500

CHECK NOTE Also check for supplements

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

INT. NOTE URL: <http://www.journals.uchicago.edu/ApJ/>

INT. NOTE If users cannot access, advise them to try again later. Access becomes available after 30 minutes of inactivity by the first/pervious user.

NOTE Access limited to one simultaneous user. Please close browser window when exiting journal.

c1362082

Edit Mode (OVR)

eTracker: Functionality

File Edit View Go Tools Admin Help

Edit Functions

Save View Edit Media(0) Summary Print

Review Current

b21761218

TITLE Digital Sanborn maps, 1867-1970. Ohio [electronic resource]

Summary Record c1360292 Card c1360292 Holdings c1360292 Routing

Check-in date Wed Sep 26 2007

UNAVAILABLE 03-21-2006 SEARCH BUTTON MI S	UNAVAILABLE 03-21-2007 NOTIFIED OL S	ARRIVED 03-26-2007 BUTTON RESTORED S	EXPECTED 01-14-2008 ACCESS TI
----------------------------------------------------	-----------------------------------------------	-----------------------------------------------	-------------------------------------

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Cover date Month/Season Day Year

Expected date 03-21-2006

Claims written 0

Total copies received 0

URL

Public Note SEARCH BUTTON MISSING

Staff Note User rptd via Mike Smith that the search button was not working. Tested & confirmed this. However if searched on right bar under date or location any map could be retrieved. (de 21Mar07)

Suppress From Public Display ☒

OK Cancel

7 boxes

eTracker: Access advisories

File Edit View Go Tools Admin Help

Serials Check-in Insert Save View Edit Media(0) Summary Export Vendor Print

Review Current 48 of 286 Previous Next Stop

b22918346

TITLE Critical inquiry [electronic resource]

LOCATIONS 06302

Summary Record c1361028 Card c1361028 Holdings c1361028 Routing c1361028(0) 0 Bib-Level Holds

c1361028 Last Updated: 09-10-2007 Created: 05-16-2007 Revisions: 3

LABEL TYPE		CLAIMON	06-09-2008	SCODE3	
ORDERED BY		LOCATION	06302 UL e-journal	SCODE4	e E-RESOURCES
DISPLAY	s NDLOC/NOCON	RLOC	e ULE-RESOURCE	UPDCNT	
COPIES	1	VENDOR		PCOUNT	0

MARC Leader #####ny 22#####3n 4500

INT. NOTE DO NOT DELETE - USED FOR E-RESOURCES MAINTENANCE

INT. NOTE If users cannot access, advise them to try again later. Access becomes available after 30 minutes of inactivity by the first/previous user.

INT. NOTE URL: <http://www.journals.uchicago.edu/CJ/journal/available.html>

NOTE Access limited to one simultaneous user. Please close browser window when exiting journal.

c1361028 Edit Mode (INS)

eTracker: Known problems

File Edit View Go Tools Admin Help

Edit Functions

Review

b2645712x

TITLE Factiva [electronic resource]

Summary Record c1360474 Card c1360474

UNAVAILABLE 02-17-2007 * OLINKS NOT WORKI S

UNAVAILABLE 02-19-2007 * NOTIFIED FACTIVA S

NOT PUBLISHED 02-18-2007 * KNOWN PROBLEM S

ARRIVED 09-15-2007 ACCESS TEST

EXPECTED 09-15-2009 ACCESS TEST

UNAVAILABLE 02-17-2007 NOTIFIED OL S

UNAVAILABLE 02-18-2007 OL RESPONSE S

ARRIVED 02-18-2007 NOTIFIED FACTIVA #4 S

14 boxes

Modify Boxes Individually

Status L NOT PUBLISHED

Cover Expected Dates

Month/Season Day Year

Cover date

Expected date 02-18-2007

Enumeration

Levels v. no.

Claims written 0

Total copies received 0

URL

Public Note KNOWN PROBLEM

Staff Note User must be logged in to Factiva - does not support openurl link resolver

Suppress From Public Display ☒

OK Cancel

Save View Edit Media(0) Summary Print

Next Stop

Check In

[illegible]

eTracker: history just in case...

File Edit View Go Tools Admin Help

Edit Functions Save View Edit Media(0) Summary Print

Review Current 7 of 286 Previous Next Stop

b23200571

TITLE Images. MD [electronic resource] : the online encyclopedia of medical images

Summary Record c1360280 Card c1360280 Holdings c1360280 Routing c1360280(0) 0 Bib-Level Holds

Check-in date Wed Sep 26 2007 ☐ Create item

UNAVAILABLE 03-27-2007 * PROF ACCESS BLO S	UNAVAILABLE 03-27-2007 * NOTIFIED CURRENT S	UNAVAILABLE 03-27-2007 * UPDATED DR MARK S	UNAVAILABLE 03-27-2007 * DR MARKUS CALLED. S	UNAVAILABLE 03-27-2007 * NOTIFIED OL S	UNAVAILABLE 03-27-2007 * REQUESTED FHSL S S	UNAVAILABLE 03-28-2007 * UPDATED OL ON SIT S	UNAVAILABLE 03-29-2007 * OL LIGHTING FIRES A S
ARRIVED 03-29-2007 * PROF ACCESS REST S	ARRIVED 03-29-2007 * NOTIFIED DR MARKUS S	ARRIVED 03-29-2007 * NOTIFIED ALL PARTI S	ARRIVED 03-29-2007 * DR MARKUS CALLED S	ARRIVED 03-29-2007 * UPDATED OL S	ARRIVED 09-25-2007 ANNUAL ACCESS TE 1	EXPECTED 10-12-2007 ACCESS TEST	EXPECTED 05-12-2008 ACCESS TEST
EXPECTED 10-12-2008 ACCESS TEST	EXPECTED 05-12-2009 ACCESS TEST						

18 boxes

History detailed...

File Edit View Go Tools Admin Help

Edit Functions Save View Edit Media(0) Summary Print

Review

b23200571

TITLE Images. MD [electronic resource] : the online encyclopedia of medical i

Summary Record c1360280 Card c1360280 Holdings c1360280

Check-in date W

UNAVAILABLE 03-27-2007 * PROF ACCESS BLO S	UNAVAILABLE 03-27-2007 * NOTIFIED CURRENT S	UNAVAILABLE 03-27-2007 * UPDATED DR MARK S	UN 0
ARRIVED 03-29-2007 * PROF ACCESS REST S	ARRIVED 03-29-2007 * NOTIFIED DR MARKUS S	ARRIVED 03-29-2007 * NOTIFIED ALL PARTI S	0
EXPECTED 10-12-2008 ACCESS TEST	EXPECTED 05-12-2009 ACCESS TEST		

Modify Boxes Individually

Status U UNAVAILABLE

Cover Expected Dates

Cover date Month/Season Day Year

Expected date 03-29-2007

Claims written 0

Total copies received 0

URL

Public Note OL LIGHTING FIRES AT CM

Staff Note Stu at OL called & emld sever al times 3/28 & 3/29; he's wor king with Current Medicine to get Dr Markus' account straight ened up (de 29Mar07)

Suppress From Public Display ☐

OK Cancel

UNAVAILABLE 03-28-2007 * PDATED OL ON SIT S	UNAVAILABLE 03-29-2007 * OL LIGHTING FIRES A S
EXPECTED 10-12-2007 ACCESS TEST	EXPECTED 05-12-2008 ACCESS TEST

18 boxes

Hmmm...?





eTracking for Acquisitions

■ Track by process

- Selection
- Trials
- Licensing
- Cataloging
- Ordering
- Activation
- Evaluation (acquiring stats)

■ Track by material type

- Databases, eBooks, eJnls, eMedia, eDocs, etc.

■ Track how acquired

- Direct, SUMS vendor, consortium, freely accessible, and transfers from print to e

eTracker by material type - dbs

E-TRACKER			Template: Database Acquisition Workflow					
Status	ARRIVED	ARRIVED	EXPECTED (PARTIAL)	ARRIVED	EXPECTED	EXPECTED	EXPECTED	ARRIVED
Represents status of	Step completed	Step completed	Step in process	Step completed	Step incomplete	Step incomplete	Step incomplete	Workflow completed
Transaction Date	Date process completed	Date process completed	Date process expected to be complete	Date process completed	Date process expected to be complete	Date process expected to be complete	Date process expected to be complete	Date all steps are completed
Step	ORDER	CATALOG-ING	LICENSE	ERM / ITEM RECORDS	INVOICE	SET-UP	FRANCIS	PROCESS COMPLETED
Public display box	ORDER REQ; ORDER PLACED	BIB DWNLD; CAT REF TO...	LICENSE PEND(ING); AT LEGAL; LICENSE SIGNED; NO LICENSE	ERM RECS(ORDS ADDED & LINKED)	INVOICE RCVD; INVOICE Pd	NYA; ACTIVATED	ADDED TO FRAN; NOT IN FRAN	Access verified by.... & any details worth noting
Staff display box	Initials of party who completed step, plus any pertinent details	Initials of party who completed step, plus any pertinent details	Any details of note	Any details of note	Any details of note	Any details of note	Any details of note	Parities notified & by whom OR to be notified
Suppression	NA	NA	NA	NA	NA	NA	NA	NA



Material type - ejournal

E-TRACKER		Template: eJournal Acquisition Workflow						
Status	ARRIVED	ARRIVED	EXPECTED (PARTIAL)	ARRIVED	EXPECTED	EXPECTED	EXPECTED	ARRIVED
Rep- resents status of	Step completed	Step completed	Step in process	Step completed	Step incomplete	Step incomplete	Step incomplete	Workflow completed
Trans- action Date	Date process completed	Date process completed	Date process expected to be complete	Date process completed	Date process expected to be complete	Date process expected to be complete	Date process expected to be complete	Date all steps are completed
Step	ORDER	CATALOG- ING	LICENSE	ERM / ITEM RECORDS	INVOICE	SET-UP	A-Z LIST	PROCESS COMPLETED
Public display box	ORDER REQ; ORDER PLACED	BIB DWNLD; BRIEF BIB (ADDED)	LICENSE PEND(ING); AT LEGAL; LICENSE SIGNED; NO LICENSE	ITEM ADDED	INVOICE RCVD; INVOICE Pd	NYA; ACTIVATED	ADDED SS	Access verified by.... & any details worth noting
Staff display box	Initials of party who completed step, plus any pertinent details	Initials of party who completed step, plus any pertinent details	Any details of note	Any details of note	Any details of note	Any details of note	Any details of note	Parties notified & by whom OR to be notified
Suppres- sion	NA	NA	NA	NA	NA	NA	NA	NA



Material type - ebook

E-TRACKER		Template: eBook Acquisition Workflow					
Status	ARRIVED	ARRIVED	EXPECTED (PARTIAL)	ARRIVED	EXPECTED	EXPECTED	ARRIVED
Rep- resents status of	Step completed	Step completed	Step in process	Step completed	Step incomplete	Step incomplete	Workflow completed
Trans- action Date	Date process completed	Date process completed	Date process expected to be complete	Date process completed	Date process expected to be complete	Date process expected to be complete	Date all steps are completed
Step	ORDER	CATALOG- ING	LICENSE	ERM RECORDS	INVOICE	SET-UP	PROCESS COMPETED
Public display box	ORDER REQ; ORDER PLACED	BIB DWNLD; CAT REF TO...	LICENSE PEND(ING); AT LEGAL; LICENSE SIGNED; NO LICENSE	ERM RECS(ORDS ADDED & LINKED)	INVOICE RCVD; INVOICE Pd	NYA; ACTIVATED	Access verified by.... & any details worth noting
Staff display box	Initials of party who completed step, plus any pertinent details	Initials of party who completed step, plus any pertinent details	Any details of note	Any details of note	Any details of note	Any details of note	Parities notified & by whom OR to be notified
Suppres- sion	NA	NA	NA	NA	NA	NA	NA



Top Ten benefits of eTracker



- 10. Provides a visual linear progression to access status of calls and orders**
- 9. Saves funds purchasing an outside tracking system or seats on university's system**
- 8. Saves space and time spent tracking emails**
- 7. Compliments - does not replace ERMS**

Top Ten benefits of eTracker



6. **Provides ability to delegate tracking tasks to lower-level staff**
5. **Provides a method for transitioning print checkin and claiming staff into the “e” workflow**
4. **Supervisors can see what needs done and reassign tasks as needed *(i.e. vacations, projects, increase workloads)***

Top Ten benefits of eTracker



3. Enables public staff to view status of calls and orders thereby improving service
2. Provides use of resources (*that you already have*)
1. It's a visual tool that can be utilized to make the case to superiors that...

“Whew!, I’m soooooooo busy!”

i.e. More staff time needs assigned to eWorkflows!

Questions?



Contact:

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